



California Association of Legal Support Professionals

**Volume 9 / Issue 3 / Fall 2016 / Conference Issue**

CALSPRO 48TH ANNUAL CONFERENCE

# CHANGE, CHALLENGE, OPPORTUNITY



OCTOBER 7-9, 2016  
SAN FRANCISCO AIRPORT  
WATERFRONT MARRIOTT

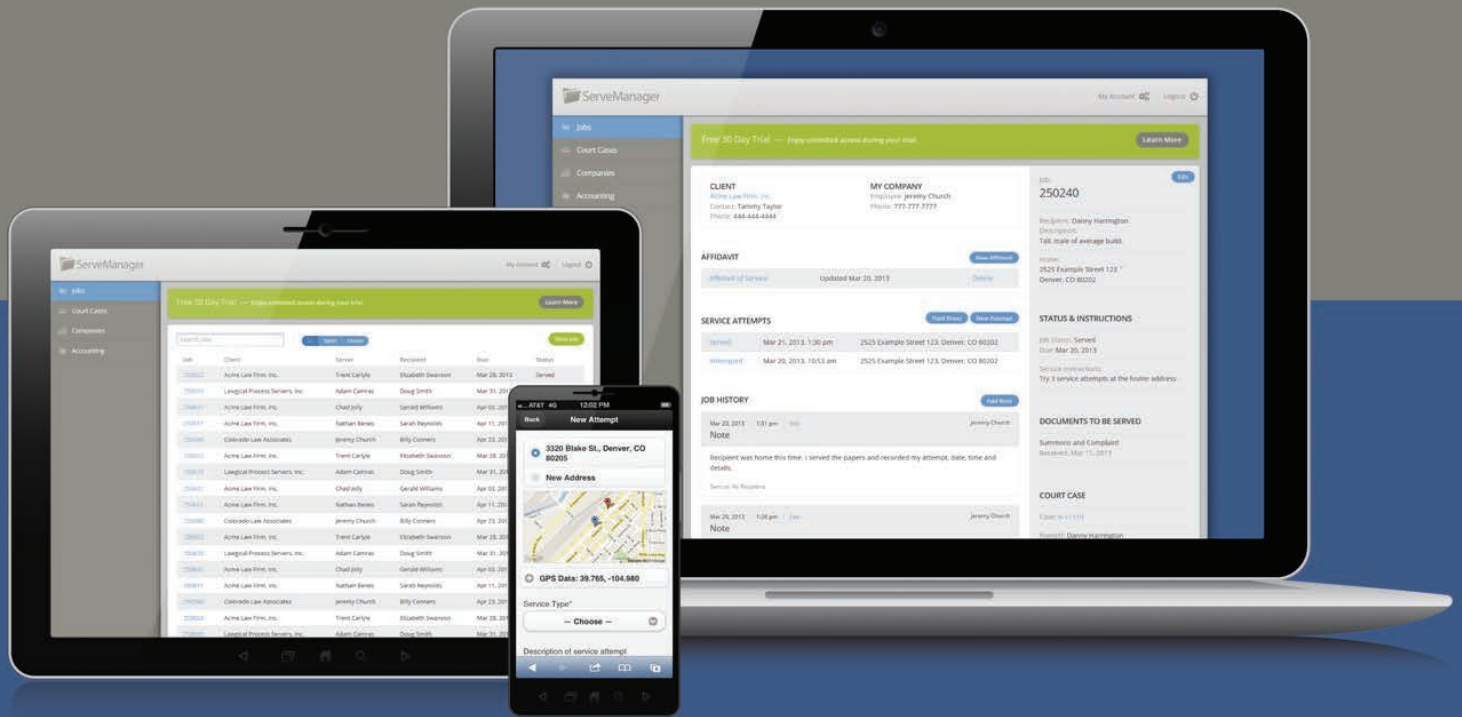


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**California Association of  
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 Sacramento, California 95833  
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 Web site: [www.calspro.org](http://www.calspro.org)  
 E-mail: [info@calspro.org](mailto:info@calspro.org)





# PRESIDENT'S MESSAGE

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CLIFF JACOBS

2016 CALSPRO PRESIDENT

**W**ith conference quickly approaching and so many people working tirelessly to make the member experience special, I wonder who will attend this year; the dedicated core group who come every single year, the members who come now and again when the venue is near them, those who used to come, stopped for a while and are now coming again, or members who are coming to conference for the very first time. This last group (arguably my favorite) is in for a real treat this year because their first experience of Conference will include a comedian Friday evening, and incredible Educational programs full of new, timely and pertinent information that you typically will not find collected, nor readily available. What makes it even more special is that true leaders and pioneers within our industry will be presenting.

The theme of our conference this year is Change, Challenge, Opportunity; aptly named, considering what is transpiring in California regarding the Courts, Law Firms, Process Serving, and Compliance, especially in light of Dodd-Frank and the CFPB, and their increased impact on our profession in the immediate future. Please understand that some of what is being presented has been introduced in the recent past, and is now something that we can fully engage in as a conversation. However, there will also be a focus on new and challenging information that is only recently emerging as a new factor with

which we will have to reckon. It will affect our businesses, and perhaps most importantly, our ongoing success.

Over the last several years, when Courts' budgets statewide were severely cut a few years in a row, it forced Court Administration to re-think efficiencies and come up with solutions to do more with less. One of the results was their investing in available and emerging technology, which fueled the interest of adopting some form of e-Filing, now noticeably spreading throughout the counties of our state. Whether you cover counties that have already adopted e-Filing (mandatory or voluntary, for some or all types of filings), or cover counties that already have target dates established for adopting and implementing e-Filing in the near future, or cover counties that are only now starting to engage in this conversation, we are all impacted. Our panel of e-Filing solution providers, will clarify any questions you have about e-filing; and explain how you can become a provider of e-Filing services to your customers.

Some of us are already fully engaged in the opportunities that have surfaced as a result, and are more than willing to share what they have learned and what they have done to stay vital during the transition. We need to garner as much information as possible to assist the decisions we will be making. There are also new opportunities that you will learn about (many of us, for the very first time) regarding developments in the

financial sector which has now trickled down to Law Firms regarding their 3rd party vendors (that's us) and compliance concerns. We have an entire session devoted to this because it is already directly impacting some of us, and is sure to affect us all in the immediate future. Eric Vennes and Paula Ashcraft will include in their presentation, a discussion of opportunities that are available for those of us who are interested in becoming certified as being "in compliance."

Adam Camras will be discussing time as a commodity, and offer concepts that will make a positive difference in all that you do; and Andy Estin will be tackling the daunting situation of preparing properly for a Deposition or testimony at a hearing, including some valuable tips. In total, we are providing 4 excellent educational programs that are designed for most everyone in our profession. Every one of them will be chock full of pertinent and valuable information. In addition, we will have the Sunday morning Roundtable sessions that so many of us enjoy. So, if ever there was a conference that should be labeled as a "must attend" event, surely it is this year's conference.

I look forward to seeing you at the Waterfront Marriott in October, and until then, be well.

A handwritten signature in blue ink that reads "Clifford C. Jacobs".





# CALSPRO Legislative Update

*By Steve Janney, Legislative Chair*

**A**s the Legislative season winds to its end, it is an exciting time for CALSPRO as our two pieces of legislation work their way towards becoming part of the judicial codes that run our courts' policies and procedures. It has been a challenging year as our association has discussed, decided, developed and then advanced legislation.

In December 2015 at the CALSPRO Board meeting, our legislative agenda was set. We have been focused on two specific pieces of legislation. They are:

**AB2211** – The need for this bill came when some sheriffs began requiring the same process server who was serving a writ to deposit that writ with the sheriff. This bill would provide that the registered process server is authorized to have the required documents and fee delivered to the levying officer by someone other than the process server himself or herself.

This bill was signed by the Governor and chaptered on July 25, 2016. It becomes effective on January 01, 2017.

**AB2244** – The summary of this legislation reads "Existing law authorizes the electronic service of documents in accordance with uniform rules adopted by the Judicial Council, as specified. Upon Judicial Council adoption of the uniform rules, existing law authorizes a superior court, by local rule, to require mandatory electronic filing and service of documents for specified civil actions in accordance with certain requirements including a requirement that any fees charged by the court do not exceed the actual cost of electronic filing and service of documents. This bill would add the additional requirement that a fee to process a payment that is charged by the court, an electronic filing manager, or an electronic filing service provider, does not exceed the actual costs incurred for processing the payment. The bill would require waiver of fees to process a payment if the court deems waiver appropriate. This bill contains other related provisions and other existing laws."

This legislation was the result of close work of the Coalition for Improving Court Access and CALSPRO. We believe that this

is significant legislation that puts the legal support profession at the forefront as the courts implement efilng and discuss eservice.

This bill was enrolled (sent to Governor Brown for signature) on July 25, 2016. He has until the end of September to sign this bill.

As we begin to look towards a Legislative Agenda for 2017, discussion will begin as to direction at our 2016 Conference. 2017 will be an exciting year as we continue to discuss registration, efilng, eservice and other significant issues that can be addressed legislatively. I look forward to seeing many of you in San Francisco.

# CALSPRO 48TH ANNUAL CONFERENCE

## CHANGE, CHALLENGE, OPPORTUNITY

**C**ALSPRO are you ready for what is in store for us in San Francisco? We have a lot of changes this year and I'm sure you won't want to miss them. From a laugh out loud Friday night to a change in format for this year's educational sessions. Don't worry about your favorite activities such as the Jack C. Janney Memorial Golf Tournament, Friday Night Mixer and Silent Auction are still around.

Friday night you can expect a great time and great atmosphere as CALSPRO welcomes Dan Mires. Dan is a professional comedian who has several years of experience entertaining. He is known by his peers as the clean comedian and has performed for corporate groups such as AOL and Beck Consulting. With great food and great people, this is sure to be a memorable night for all who attend. You don't want to miss this year's mixer.

So, with everyone ready and pumped up from a fantastic reception, you should find yourself full of energy and ready for our Annual Business Meeting and Educational Sessions. Be sure your voice is heard as there will be By-Law Amendments on the table and a new Board of Directors to be voted on as well.

After the morning business meeting we are switching this up just a bit this year. We normally have three educational sessions. CALSPRO is excited to bring you four sessions this year which should be value added.

We have Adam Camras helping us all out with a much needed topic during education session number one – *Time is the New Green*. Adam's presentation is sure to aid everyone whether it be in the office or at home. Adam always brings energy to his presentations so be sure not to miss it. We could all use a little time management.

Education session number two is a must for anyone looking to expand or prepare themselves for the future. Paula Ashcraft of Green Tree Legal, LLC. and H. Eric Vennes of Apex Legal Service present a comprehensive look into financial compliance. Looking for additional revenue streams? Well here it is. If you want to be prepared for upcoming changes with regard to compliance, then this is the education session for you. Be ahead of the curve and hit the ground running. It always pays to be prepared.

Our third education session brings us Andy Estin. Andy will be educating us on the nuances of Deposition or Court Testimony Preparation and Tips. If you have ever had to take the stand you'll know you need to be prepared. If you haven't you would probably find the first time intimidating. Get prepared now for success tomorrow.

The fourth and final education session brings us the return of our continuing effort to educate you on the latest happenings regarding Electronic Filing Service Providers. Several EFSP's will be participating in a panel discussion moderated by our very own CALSPRO Vice President, Larry Kirlin. This session is a must for anyone who is interested in learning about some of the options available to you as an individual or as a company with regard to electronic filing. With several courts implementing efilg and several more coming on line, it is imperative to stay in the loop. This is a part of our business that is and will be changing and evolving for the foreseeable future. It's an action packed day and you will want to stay around to the end for this one.

Saturday night is always a great time. We start things off with a cocktail reception which is always a fantastic time to continue building those business relationships and to

participate in the silent auction. We continue the evening with our CALSPRO Banquet. Here we have a few laughs, eat some good food, and welcome our new Board of Directors during the installation.

Sunday morning brings us our Round Table Discussions. Participants have expressed how much they enjoy these additional opportunities to continue to learn nuances and additional information to help themselves or their businesses thrive.

San Francisco is the place to see and be seen this October 7th through the 9th. There is no other opportunity like CALSPRO's Annual Conference in California to build, grow, enhance and allow yourself or company to stay relevant.

If you have attended previously and are planning to join us again, you won't be disappointed. If you have not attended conference and were waiting for the right time, wait no more. The time is right and the time is now. Like they say, there's no time like the present.

CALSPRO is looking forward to seeing you in the City by the Bay so join us in San Francisco.

This is my first year as CALSPRO Conference Chairman and my goal is to provide you with opportunities to have fun, learn, network and encourage you to participate. We want you to feel like you gained more knowledge than you arrived with and left with more business opportunities and contacts. We are all in this together so let's get together, in a beautiful location like San Francisco.

*Kenneth Hastings - CALSPRO Director and Conference Committee Chairman*





### **San Francisco Airport Marriott Waterfront**

800 Old Bayshore Hwy, Burlingame, CA 94010  
(650) 692-9100

#### **Hotel Details**

**Room Rate:** \$162/night  
**Please book by Friday, September 16, 2016.** Please contact the hotel directly (888) 236-2427 and ask for the CALSPro rate.

#### **Conference Details**

All registrations must be returned with payment and postmarked by September 25, 2016 to avoid higher registration fees.

#### **Cancellation Policy**

Cancellations must be made in writing and received by September 25, 2016. Cancellations will be subject to a fee of \$50<sup>00</sup> per person. No refunds will be allowed for cancellations received after September 25<sup>th</sup>.

## **California Association of Legal Support Professionals**

2520 Venture Oaks Way, Suite 150

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## Annual Business Meeting

The Annual Business Meeting will be held on Saturday, October 8 from 8:00 am – 10:00 am and from 1:45 pm – 2:45 pm. During these sessions, important topics will be discussed, including: a Legislative Update; Committee Reports; Nominations and Elections for the Officers and Board of Directors; and General Member Comments/Suggestions. The Annual Business Meeting is an important component of the conference and provides members with the opportunity to participate and get involved in industry and association activity.

### VOTING

Please be reminded that only current "Individual" Members are allowed to vote or hold elected office. No other category of membership has a right to vote or hold elected office.

If you are currently not an Individual Member, please take a moment and join right away. As a member of the association, it is important that you make your vote count and be an active participant. You may also want to consider running for the Board of Directors. Important – no person shall be eligible for election as an officer or to the Board of Directors unless he/she has been a member for one year or was admitted at the last Annual Conference.

An Individual Membership application is contained in this registration brochure – please complete it and send it in with your conference registration.

## 20<sup>TH</sup> ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Friday, October 7, 2016

7:30 am Check-In

8:00 am Tee-Off

### *Crystal Springs Golf Course*

6650 Golf Course Dr,  
Burlingame CA 94010  
(650) 342-0603

### Transportation on own

\$125<sup>00</sup> per person; includes green  
fees, cart, and buffet lunch.

*Registration cutoff September 23rd.  
Register Now.*



**Awards for**

**1<sup>st</sup>, 2<sup>nd</sup> & 3<sup>rd</sup> place teams**

## PERUSE THE SILENT AUCTION ITEMS AND BE A LUCKY BIDDER!

**Winners will be announced at the  
Saturday Night Banquet**

## INTERESTED IN BECOMING A CCPS (CALSPRO CERTIFIED PROCESS SERVER)?

... or just need to renew your certification or fine  
tune your serving skills?

**Be sure to sign up for the exam on  
Saturday, October 8th**





# 20<sup>TH</sup> ANNUAL JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

**WHEN:** FRIDAY, OCTOBER 7TH, 2016

7:30 AM CHECK-IN, 8:00 AM TEE-OFF

**WHERE:** Crystal Springs Golf Course  
16650 Golf Course Dr, Burlingame 650.342.0603

**YOUR SPONSORSHIP GOES TOWARD** • Prizes for Longest Drive  
Closest to the Pin • Other Great Golf Items Via Prize Raffle

## Yes, sign me up to sponsor!

Information for Signage

Name: \_\_\_\_\_

Slogan: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Message: \_\_\_\_\_

So that your company name can be included in the necessary conference materials, the deadline for sponsorship submission is September **23, 2016 at noon**. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in some conference materials. [Company logos should be e-mailed to: stephanie@camgmt.com](mailto:stephanie@camgmt.com). Checks made payable to CALSPRO at 2520 Venture Oaks Way, Suite 150 Sacramento, CA 95833 or you may fill out the credit card form below and fax it to: 916.924.7323. **Please do not email.**

Name of Card Holder \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ CID # \_\_\_\_\_

Amount to be charged \$ \_\_\_\_\_

Signature of Card Holder \_\_\_\_\_

## SPONSORSHIP OPPORTUNITIES CHECK ONE!

### ☐ HOLE IN ONE

\$250.00 Sponsorship

- Choice of Golf Partner
- Logo & Message Printed on 3 Tee's of your Choice
- Logo in Conference onsite program
- Verbal Acknowledgement at the Buffet Lunch and Installation Banquet
- Special Gift Valued at \$50

### ☐ DOUBLE EAGLE

\$150.00 Sponsorship

- Logo printed on Golf Signage
- Logo & Message Printed on 2 Tee's of your Choice
- Verbal Acknowledgement at the Buffet Lunch and Installation Banquet

### ☐ TEE HOLE

\$75.00 Sponsorship

- Logo Printed on Tee of your Choice
- Verbal Acknowledgement at the Buffet Lunch and Installation Banquet

# CONFERENCE SCHEDULE

## FRIDAY OCTOBER 7, 2016

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### 8:00 AM

**20th Annual CALSPro Jack C. Janney Memorial Golf Tournament**

### 4:00 PM – 5:30 PM

**Board of Directors' Meeting**

### 5:30 PM – 7:30 PM

**Registration Open/Exhibitor Set Up**

### 7:00 PM – 9:00 PM

#### **Welcome Event**

This year's Friday Night Welcome Event will be held on site and features great food, drinks and is headlined by comedian Dan Mires. It should be a fantastic time for everyone to meet new contacts, catch up with old friends and enjoy a great evening.

## SATURDAY OCTOBER 8, 2016

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### 7:00 AM – 8:00 AM

**Continental Breakfast**

### 7:00 AM – 5:00 PM

**Registration, Exhibits & Silent Auction Open**

### 8:00 AM – 10:00 AM

#### **Annual Business Meeting**

Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, and Legislative Update with Mike Belote, Esq. California Advocates, Inc. Nominations Open for the Board of Directors. This meeting will also include an Antitrust Presentation by Antitrust Officer, Mike Belote, which shall summarize CALSPro's obligations under the FTC Order and shall also address compliance with the Antitrust Laws and updated information on the Coalition.

### 10:00 AM – 10:30 AM

**Exhibitor Break and Exhibitor Presentations**

### 10:30 AM – 11:30 AM

#### **Continuing Education Session Number 1**

Adam Camras of ServeNow.com will be presenting: *Time is the New Green - Apps and Tools to Optimize Your Firm and Life.*

### 11:30 AM – 12:30 PM

**Networking Luncheon Buffet and Bert Rosenthal Memorial Award Committee Presentation**

### 12:30 PM – 1:30 PM

#### **Continuing Education Session Number 2**

Paula Ashcraft of Green Tree Legal and H. Eric Vennes of NAPPS will present a comprehensive look into compliance.

### 1:30 PM – 1:45 PM

**Exhibitor Break**

### 1:45 PM – 2:45 PM

**Annual Business Meeting continued Nominations, Elections, and Committee Reports**

### 2:45 PM – 3:15 PM

#### **Continuing Education Session Number 3**

Andy Estin will present *Deposition or Court Testimony Preparation and Tips.*

### 3:15 PM – 3:30 PM

**Exhibitor Break**

### 3:30 PM – 5:00 PM

#### **Continuing Education Session Number 4**

Electronic Filing Service Providers will team up to provide conference attendees with unparalleled access to critical information regarding eFiling in California. Attendees will have an opportunity to learn about different companies that offer EFSP service(s). There will be an opportunity for Q&A as well. EFSP Panelists include: Jeff Ellis of LegalConnect, Ron Beach of Journal Technologies Inc., Alex Zilberfayn of TurboCourt, and Eric Eastman of Green Filing.

### 5:00 PM – 5:30 PM

**Meeting of the New Board of Directors**

### 5:00 PM – 6:30 PM

**CCPS Exam Review and Exam**

### 6:30 PM – 7:30 PM

**Cocktail Reception  
Silent Auction Closes**

### 7:30 PM – 9:30 PM

**Awards and Installation Banquet**

## SUNDAY OCTOBER 9, 2016

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### 7:30 AM – 11:00 AM

**Registration and Exhibits Open**

### 7:30 AM – 9:00 AM

**Continental Breakfast**

### 9:00 AM – 11:00 AM

#### **Interactive Roundtable Sessions**

Roundtable topics include Process Servers Tips and Tricks as well as Social Media: Putting Social Media to work for you.

### 11:00 AM

**Conference Adjourns – Thank you for attending.**



# CHANGE, CHALLENGE, OPPORTUNITY

## 48th Conference Sponsorship Opportunities

**We have MANY sponsorship opportunities at the upcoming CALSPro Conference. Check it out!**

Please mark the appropriate category you have chosen and return this document along with payment to CALSPro, 2520 Venture Oaks Way Suite 150, Sacramento, CA 95833 • 916.239.4065 • 916.924.7323/fax • [www.calspro.org](http://www.calspro.org) • [info@calspro.org](mailto:info@calspro.org)

● I will donate \$ \_\_\_\_\_

● I will be a **Pearl Sponsor – \$250**

Includes: listing in Conference on-site program, verbal acknowledgement at luncheon, logo display inside a future issue of the *CALSPro Press*.

● I will be a **Ruby Sponsor – \$500**

Includes: logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgement at luncheon, logo display inside a future issue of the *CALSPro Press*.

● I will be a **Diamond Sponsor – \$1,000**

Includes: one exhibit table, logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgement at luncheon and installation banquet, logo display inside a future issue of the *CALSPro Press*, 2 complimentary tickets to luncheon and banquet.

### EVENT SPONSORSHIP:

Please check ☒ your preference(s):

■ Silent Auction Item - Please list Item: \_\_\_\_\_

■ Silent Auction Donation - Please list amount: \$ \_\_\_\_\_

■ Education Session Sponsorship – \$500 (3 available)

■ Saturday Morning Continental Breakfast – \$350 (3 available)

■ Saturday Night Cocktail Party (Drinks) – \$500 (2 available)

■ Saturday Night Cocktail Party (Appetizers) – \$500 (2 available)

■ Sunday Morning Continental Breakfast – \$350 (3 available)

■ Refreshment Break – \$250 (3 available)

**Yes, sign me up to sponsor!** Total amount of sponsorship: \$ \_\_\_\_\_

Company: \_\_\_\_\_

Contact Person: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

So that your company name can be included in the necessary conference materials, the deadline for sponsorship submission is September 23, 2016. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in some conference materials. Company logos should be e-mailed to: [stephanie@camgmt.com](mailto:stephanie@camgmt.com).

**Checks made payable to CALSPro** (address above) or you may fill out the credit card form to the right and fax it to: 916.924.7323. **Please do not email.**

Name of Card Holder \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_

CID # \_\_\_\_\_ Amount to be charged \$ \_\_\_\_\_

Signature of Card Holder \_\_\_\_\_

Updates and Conference information will be available on the CALSPro website (above), so please make sure you visit the site often.

Thank you to all the CALSPro members who contribute their personal time, sponsorships and creative efforts to help make each Conference a success. Without your support, our members would not have the opportunities that they have today to operate and grow their businesses.

**• Support Your Industry! • Meet New People! • Have Fun! • See You in Burlingame! •**

# CHANGE, CHALLENGE, OPPORTUNITY

## 48TH CONFERENCE October 7-9, 2016 Burlingame, CA **Registration Form**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Attendee Name:

(Print the way you would like your name badge to read)

#### Full Registration – Member

☐ \$250 ☐ Late Registration \$295\*

**"Member" includes all employees of a "Company" Member and Individual and Associate Members. Full registration includes all conference events.**

#### Full Registration – Non-member

☐ \$350 ☐ Late Registration \$395\*

#### Non Member Guest

- ☐ All events \$200
- ☐ Friday Evening Only \$70
- ☐ Saturday Lunch Only \$60
- ☐ Saturday Banquet Only \$80

#### Golf Tournament

☐ \$125

#### (CCPS) Exam

- ☐ \$10 ( Individual members)
- ☐ \$15 (Company members)
- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_

### Attendee Name:

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#### Golf Tournament

☐ \$125

#### (CCPS) Exam

- ☐ \$10 ( Individual members)
- ☐ \$15 (Company members)
- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_

\* Registration must be postmarked by September 23rd to avoid additional fees.

## PAYMENT OF FEES:

**GRAND TOTAL: \$** \_\_\_\_\_

☐ Check (payable to **CALSPRO**) ☐ AmEx ☐ Visa ☐ MasterCard

Cardholder Name: \_\_\_\_\_ Address: \_\_\_\_\_

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ 3-4 Digit Security Code: \_\_\_\_\_

Signature: \_\_\_\_\_

Please feel free to make copies of this form for additional registrations.



**ONLINE:**  
[www.calspro.org](http://www.calspro.org)



**VIA FAX:**  
(916) 924-7323



**VIA MAIL:**  
2520 Venture Oaks Way, Suite 150  
Sacramento, CA 95833



# California Association of Legal Support Professionals

## Bert Rosenthal Memorial Award



**E**ach year the Bert Rosenthal Committee meets and makes nominations for recipients of the Bert Rosenthal Memorial Award. This prestigious award is presented to an individual who, through the years, has given the utmost of service and dedication in promoting our industry.

This award is named after Bert Rosenthal, who was a founding member of the association and one of the most respected. He had a great sense of humor, and played an integral and fun part in our association. He was always ready to help anyone who asked or needed help. He exemplified everything this award stands for.

The committee consists of the CALSPro President, all past presidents who are still members of the association, and past recipients of the award. Should there be a recipient chosen, the name will be announced at the CALSPro Conference in October.

### The Nominees for 2016 Are:

**Chad Barger**  
**Jack Biggerstaff**  
**Wendy Bowman**  
**Michael Kern**

### Past Rosenthal Recipients

<b>1978 Bert Rosenthal (In Memoriam)</b>	<b>1997 Paul R. Anderson</b>
<b>1979 Michael Buter</b>	<b>1998 Robert A. Cook</b>
<b>1980 Andrew R. Estin</b>	<b>1999 Jeffery H. Karotkin</b>
<b>1981 Richard J. Green</b>	<b>2000 Edward R. Wasserman</b>
<b>1982 Not Awarded</b>	<b>2001 Robert D. Alkema</b>
<b>1983 Carl Strang</b>	<b>2002 Al Crowe</b>
<b>1984 Hugh Hallenberg</b>	<b>2003 David S. Nill</b>
<b>1985 Connie R. Melvin</b>	<b>2004 Mark L. Schwartz</b>
<b>1986 Jaunita Tanzer</b>	<b>2005 Ronald Ezell</b>
<b>1987 Not Awarded</b>	<b>2006 Paul Tamaroff</b>
<b>1988 Not Awarded</b>	<b>2007 Jerry Topolos</b>
<b>1989 Elaine J. Erdman</b>	<b>2008 Jack Janney (posthumous)</b>
<b>1990 Thomas J. Bowman, Jr.</b>	<b>2009 Herbert E. Hoffman</b>
<b>1991 Michael O. Price</b>	<b>2010 Not Awarded</b>
<b>1992 Joseph H. Karotkin</b>	<b>2011 Steven Janney</b>
<b>1993 Not Awarded</b>	<b>2012 Mike Belote</b>
<b>1994 Frederic A. Blum</b>	<b>2013 Brett Peters</b>
<b>1995 Tony Klein</b>	<b>2014 John Perez</b>
<b>1996 Not Awarded</b>	<b>2015 Jennifer Blevins</b>

**California Association of Legal Support Professionals  
Notice of Annual Business Meeting And  
Bylaw Amendment Proposals**

*September 6, 2016*

In accordance with the California Association of Legal Support Professional's Bylaws, Article VII – Meetings, Section 9, notice is hereby given of the Annual Meeting of the membership which shall take place on **Saturday, October 8, 2016** from 8:00 a.m. – 10:00 a.m. and from 1:45 p.m. – 2:45 p.m. at the San Francisco Airport Waterfront Marriott, 1800 Old Bayshore Hwy, Burlingame, CA 94010. The meeting will be held in conjunction with the 48<sup>th</sup> Conference. For further conference details, please visit the CALSPRO website at <http://calspro.org/events/annual-conference/>.

In accordance with the California Association of Legal Support Professional's Bylaws, Article XII – Amendments, Section 1, the following proposed bylaw amendments are being placed in writing and included in this notice of the Annual Meeting. The Bylaws may be repealed or amended or any Bylaws may be adopted at the Annual Meeting by a vote of two-thirds of the voting (Individual Members) members present and voting at the Annual Meeting.

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California Association of Legal Support Professionals Proposed Bylaw Amendments  
For Presentation to the Members on October 8, 2016:

**Strikethrough denotes deletions and *italicize with underline* denotes insertions.**

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**PROPOSAL #1 of 2:**

Purpose: To give Honorary members the right to vote.

**ARTICLE IV – MEMBERSHIP**

**Section 5. Honorary Member.** Honorary members shall have all rights and privileges of membership; ~~excluding~~ *including* the right to vote, ~~but shall not have the right~~ *and* to hold elected office. The privilege of this membership shall be determined by a majority of the Board of Directors. ~~An~~ Honorary members shall be a dues-exempt membership.

---

**PROPOSAL #2 of 2:**

Purpose: To create a "Retired" membership category.



## **ARTICLE IV – MEMBERSHIP**

**Section 6. Retired Member.** *A Retired Member shall be a current or former Individual Member of this Association, in good standing, who has permanently retired from the practice of process serving, court filing, photocopy, or the legal support profession. A Retired member shall have all the rights and privileges of membership, including the right to vote, but shall not have the right to hold elected office. The privilege of this membership shall be determined by the Membership Committee upon application by the individual. A Retired member shall be dues-exempt.*

If proposal #2 is approved:

It would be added as section 6 to Article IV

The current section 6 renumbered to section 7

The current section 7 renumbered to section 8

The current section 8 renumbered to section 9

The current section 9 renumbered to section 10

The current section 10 renumbered to section 11



**Judgment Enforcement Fundamentals Class October 14, 2016 in Sacramento California**

**8 hour program on basics of starting and operating a judgment enforcement business**

**Want to learn how to enforce court judgments? Our Class teaches how to:**

- ☛ Find Judgments to Enforce
- ☛ Marketing & Advertising your business
- ☛ Locate assets of the Judgment Debtor
- ☛ Become skilled at enforcing judgments
- ☛ And much more

**Class includes breakfast and lunch**

**Register at [www.cajp.org/events](http://www.cajp.org/events)**

**Mike Belote will present a complete legislative update during the upcoming Conference on Saturday, October 8th during the Annual Business Meeting – be sure to attend. See page 11 for registration information.**

# Calling All Future Leaders

*You are Invited to Serve on the CALSPro Board of Directors*

*by Jennifer Blevins, Administrator*

If you have been an Individual Active member of CALSPro for at least one year or since last year's Conference, we invite you to serve in a leadership capacity. Annual elections for the Officers and Board of Directors will take place during the Annual Business Meeting on Saturday, October 8, 2016 at the San Francisco Waterfront Marriott during the 48th Conference.

Organizations of all types may succeed or fail on the strength of their leaders, and associations are no different. From executive decision making to establishment of an organizational culture where volunteers

***"[E]ffective and strong leadership ensures that an association has the direction and resources needed to meet its goals and to operate to its fullest capacity."***

feel welcome, included, and empowered to contribute, effective and strong leadership ensures that an association has the direction and resources needed to meet its goals and to operate to its fullest capacity. The Board of Directors sets the tone and direction of an organization. Serving as a CALSPro Officer and/or a member of the Board of Directors is a tremendous privilege and a way to give back to your fellow members and your community.

The Board of Directors currently meets four times per year in person, with one of the four meetings occurring at the Conference. The other in-person meetings are held in March or April, June and December. This year, the board added three additional meetings which were held via conference call. The conference call meetings were brief, touch base meetings held primarily to handle any time sensitive action items. The Officers

and Board of Directors are involved in many key issues relating to maintaining the success of the association. These key issues include, but definitely are not limited to: legislation, technology, court relations, and in partnership with the association management company, association administration, such as member relations and communications, budget and finance oversight, and conference and education program management. It is important for the association that the leadership is engaged, active, participatory, and dedicated; and your association leadership has been very strong and effective in all of these areas.

Serving in a CALSPro leadership role allows you to be at the forefront of hot industry issues, to be actively involved in action affecting the entire legal support industry, to help shape the direction of the association's future while maintaining the integrity of the history of CALSPro, to get ideas for your own business, and to have an impact in the legal community. If you aren't ready to serve as an Officer or a member of the Board of Directors, please consider serving as a Committee Chair or as a committee member. Future leaders need to start somewhere, and committee involvement is the perfect place.

Please seriously consider serving in a leadership role for 2016-2017, be inspired, make a difference -- you will reap many rewards.

See you at Conference!

## CALSPro COMMITTEES

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# EDUCATION

## Continuing Education Report by Chad Barger

**A**nother successful year is coming to a close for the continuing education committee. We are very proud to have been able to bring our program to the entire State of California at a higher level than ever before. My co-chair, Cliff Jacobs and I, have worked tirelessly and traveled far and wide to make sure our members and process servers alike are educated. We want to say thank you to those who helped make the program successful this year. Mark Manchester, Michael Kern and CALSPro's home office have been instrumental and we couldn't have done it without them.

Our most recent workshop was held in San Rafael last August. We had a great turnout and are very proud to welcome ten new CCPS designees. We want to thank Rush Services for their generous sponsorship and all the people who attended.

If you've missed us this year, you have one more opportunity at conference. This is your last chance to recertify or extend

your CCPS designation. If you're not CCPS certified and live in the bay area or are attending conference, we encourage you to attend and take advantage of this tremendous opportunity.

I'd like to bring your attention to the excellent educational opportunities coming up this year at our conference in South San Francisco, October 7-9, 2016. Our sessions include Adam Camras from ServeNow presenting "Time is the New Green – Apps and Tools to Optimize your Firm and Life". Paula Ashcraft from Green Tree Legal and H. Eric Vennes of Apex Legal Services presenting a comprehensive look into compliance. Andy Estin presenting "Deposition or court testimony preparation and tips". Jeff Ellis of LegalConnect, Ron Beach of Journal Technologies, Alex Zilberfayn of TurboCourt and George Knecht of Green Filing will be our electronic filing service provider panel.

With so many great educational opportunities this year at conference, I encourage you to join the conversation and get involved. Our profession is facing challenges and knowledge is the best way to prepare yourself for the future. One of my favorite quotes is "If you're not willing to learn, no one can help you. If you're determined to learn, no one can STOP YOU". See you in San Francisco!

### California Association of Legal Support Professionals 2016 Calendar of Events

**October 8, 2016**

**Board of Directors Meeting**

Conference  
San Francisco

**October 7-9, 2016**

**CALSPro 48<sup>th</sup> Conference**

San Francisco Airport Marriott Waterfront

**December 3, 2016**

**Board of Directors Meeting**

Legislative Committee Meeting  
San Jose

**CALSPro 48<sup>th</sup> Conference**

October 7-9, 2016

San Francisco Airport  
Marriott Waterfront

1800 Old Bayshore Highway  
Burlingame, CA 94010

650.692.9100

Please check the CALSPro website for a complete listing of all events, including CCPS Workshops and Exams. [www.calspro.org](http://www.calspro.org)



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Go Directly To You With A Direct Connect.***

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Or Call Doug Kramer At  
1 800-687-0130 For More Information***

# CONFERENCE VENDOR LISTINGS

## CONFERENCE EXHIBITORS

### **Captira Analytical**

1 Park Place  
Albany, NY 12047  
518.312.4166  
518.362.0069 - fax  
Cory Anderlohr – [canderlohr@captira.com](mailto:canderlohr@captira.com)  
[www.captira.com](http://www.captira.com)

### **Database Services, Inc.**

5415 Lake Howell Road #327  
Winter Park, FL 32792  
407.679.1539  
Bobby Musser – [bobbym@dbsinfo.com](mailto:bobbym@dbsinfo.com)  
[www.dbsinfo.com](http://www.dbsinfo.com)

### **LegalConnect**

14748 Pipeline Ave. Suite B  
Chino Hills, CA 91709  
925.787.7122  
909.664.9567 - fax  
Jeff Ellis – [jellis@legalconnect.com](mailto:jellis@legalconnect.com)

### **ServeNow & ServeManager**

11693 San Vicente Blvd. #910  
Los Angeles, CA 90043  
800.280.4400  
Mindy Naumer – [mindy@servenow.com](mailto:mindy@servenow.com)

## THANK YOU TO OUR CONFERENCE SPONSORS

### **Golf Awards**

Janney & Janney Attorney Service

### **Diamond Sponsor**

LegalConnect

### **Friday Evening Comedian**

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### **Tote Bags**

Attorney's Certified Services

## CALSPRO 2015 - 2016 Officers

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