

Volume 9 / Issue 2 / Summer 2016



LEGISLATION

Legislation:

2015 - 2016 Term Winds Down



MEMBERSHIP

Membership:

Take Advantage of Our Many Benefits



EDUCATION

Education:

Get Certified!



CONFERENCE

Conference:

October 7th - 9th, 2016

San Francisco Airport Marriott Waterfront



Association members get

\$50 off
new subscriptions

Plus, we'll donate
\$50 to CALSPRO



Activate your promotion and see full details here:
www.servemanager.com/pages/calspro

Or, call us at (800) 280-4400

- ✓ Invite clients, and share jobs.
- ✓ Save companies and contacts.
- ✓ Email attempts and affidavits.
- ✓ Print or email invoices.



INSIDE THIS ISSUE

- 2 President's Message**
- 3 Capitol Report**
- 4 Legislative Update**
- 5 CALSPRO Conference**
- 12 Bert Rosenthal Memorial Award**
- 13 CALSPRO Advertising Update**
- 14 CALSPRO Vendor Listings**
- 16 The Right Approach**
- 17 Hired and Non-Owned Auto Insurance**
- 19 Coalition Update**
- 20 CALSPRO Membership Update**

Thank you to our Advertisers

ServeNow – Inside Front Cover
 1-800-Process – 18
 CAJP – 20

eDelivery of your CALSPRO Press

The CALSPRO Newsletter is now available in electronic format only! Make sure we have your current e-mail address, so you don't miss an issue: stephanie@caladmanagement.com

CALSPRO is not responsible for the accuracy of any comments herein relating to their own case or actual law. All readers should do research as to the actual legality of any issue. Opinions, viewpoints, or articles published under a byline and appearing in this newsletter do not necessarily reflect the official position of this association. Acceptance of advertisements in no way constitutes professional approval or endorsement by CALSPRO. No anonymous Letters to the Editor will be printed. Your name will be withheld upon request.

© Copyright 2016, California Association of Legal Support Professionals. No material may be reproduced without the express written consent of the publisher. Controlled circulation postage paid in Sacramento, CA.

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150
 Sacramento, California 95833
 Phone: (916) 239-4065 • Fax: (916) 924-7323
 Web site: www.calspro.org
 E-mail: info@calspro.org



FIND US ON
FACEBOOK AND
TWITTER!



PRESIDENT'S MESSAGE

CLIFF JACOBS

2016 CALSPRO PRESIDENT

With the year halfway gone, and Conference quickly approaching, our four cornerstones are foremost in my mind. These cornerstones provide a very solid foundation upon which we have built this association; and you should know that we are strong, vital and relevant. Your membership experience is of paramount importance to me, as is how well we've engaged each other this year. It seems that we all are busier than ever, and have very little time to step back and see what the Association is doing for our profession, and for you as a member; but, I sincerely hope that you have noticed the increase in both the frequency of communication and meaningful content that we are providing, and view both as value added.

Within the past year, CALSPRO has participated in conversations that will help shape the standards of our profession statewide and beyond, long into the future. We also became a voting member of CICA, the Coalition for Improving Court Access, and we're effectively contributing, providing input to help shape policy regarding fair and equal access to the courts. Legislatively speaking, most of our members know that we have a very experienced and effective Legislative Committee; but not as many are specifically aware of the 16 active bills we currently list on our website under the Legislative Cornerstone in a [link](#) called Active Legislation. This includes CALSPRO Sponsored AB 2211 - Registered process servers, and AB

2244 - Court fees: electronic filing, both of which are of particular interest to our membership. I encourage you to follow the progress of these Bills, as well as the others. Educating yourself each legislative session can be critically impactful to the future growth and success of your business.

In regard to Education, most of our members are aware of our CCPS (CALSPRO Certified Process Server) educational program, but many members have yet to commit to participating and becoming certified. In other professions, being certified is vital, even when voluntary, and speaks highly of both the profession and the professional. It is a way to convey to your clients that you are at the top of your profession, and that you strive to be, and are among the very best. For Process Servers, there is little else that we have which exemplifies and professes this. I believe that even if you are brushing up on what you already know, and along the way happened to learn just a few of the recent changes in Forms and Codes, that it would be well worth the four hours for the Workshop and 90 minutes for the Exam, once every year or two. We provide great membership value by steeply discounting our members' cost to attend the Workshop and Exam, as in, "We're practically giving it away". I can't help but wonder why, as legal support professionals, anyone would not want to be identified as being certified. Our program includes content specifically included to keep you current and abreast of ongoing changes in our

profession. Many of our members do not know that we have been educating and certifying process servers steadily since 1984; and even though California does not (yet) require certification testing to register as a Process Server, in Alaska, Arizona, Florida, Georgia, Montana, Missouri, Nevada, and most recently in New York, you must pass a written test to become a process server. In Texas you are required to complete an education course and receive a certificate. The fact that CALSPRO offers a formal education program and has certified servers for over 30 years is a testament to our commitment to the highest standards within this profession.

At our Annual Conference this coming October, we will be providing a timely and relevant educational program which will include segments involving the Dodd-Frank Act, the financial reform law that spawned the CFPB (Consumer Financial Protection Bureau established in 2008) and how they are affecting our profession. Dodd-Frank is having a significant impact on the scope of and regulations within the financial services sector, and has had a trickle-down effect on law firms in regard to their policies, procedures and compliance requirements regarding 3rd party vendors (think legal support companies – us!) such that we may now need to

Continued on page 15



CAPITOL REPORT

MICHAEL D. BELOTE, ESQ.
CALIFORNIA ADVOCATES, INC.

CALSPRO BILL SIGNED, COALITION ISSUE ADVANCES

The calendar may show that California is in the dead of summer, but in legislative terms the year is almost over. As this column is written, the Assembly and Senate have just returned to Sacramento for the final month of the 2015-2016 session. Under the state constitution, the legislature must adjourn by midnight Wednesday August 31, 2016. Governor Brown will then have the month of September to evaluate the many hundreds of bills which will be sent to his desk in the final days of session.

Of course, not all bills are sent to Governor Brown during the closing days, just most of them! Actually, bills trickle down to the governor throughout the legislative year. On July 25, Governor Brown signed CALSPRO-sponsored AB 2211, which was entered into the California Codes as Chapter 102, Statutes of 2016. When bills are signed, the Secretary of State issues a sequential "chapter" number by which bills become part of California law; Chapter 102 is thus the 102nd bill signed by the governor this year. In a typical year, ultimately around 800 bills are chaptered into law.

AB 2211 resolves an ambiguity concerning service of writs of attachment and execution, and earnings withholding orders. A small number of

counties have taken the position, based upon a literal reading of the Code of Civil Procedure, that the same registered process server who serves the writ must also open the file and deposit the writ after service. While the issue is obviously narrow, the wording should be cleaned up to reflect common practice. To this end, the applicable code sections have been modified to state that instead of the registered process server "depositing" the writ, the RPS must "cause" the writ to be deposited.

The change is effective on January 1, 2017. Thanks to Assembly Member Eric Linder for agreeing to carry the bill, and shepherding the issue to a successful conclusion.

Of far more consequence, we are also pleased to report that the bill suggested by the Coalition for Improving Court Access, of which CALSPRO is a member, continues to move forward in the legislative process. The bill is AB 2244 (Gatto), proposing a series of changes relating to e-filing. Among the various provisions of the bill is language that mandatory e-filing, and mandatory e-hosting, constitute recoverable costs pursuant to Code of Civil Procedure Section 1033.5; and that electronic filing service providers constitute agents of courts for purposing of collecting and

remitting fees to complete electronic transactions; and that fees imposed on EFSPs to complete payments, such as credit card transaction fees, may be recovered at actual cost.

AB 2244 has passed the full Assembly as well as the Senate Judiciary Committee. In August, the bill will be considered by the Senate Appropriations Committee, and if successful, then to the full Senate. At this point, AB 2244 enjoys the support of the Judicial Council of California, and has no opposition, so we are guardedly optimistic about the chances of getting the bill to the governor for signature.

The problem is that funny things can happen in the final weeks and days of legislative sessions. Hundreds of bills will be amended, sometimes quite substantially, and diligence is key. We will be prepared to report to the membership at the fall CALSPRO conference near the San Francisco Airport. Please plan to attend!



CALSPRO Legislative Update

By Steve Janney, Legislative Chair

According to our Cornerstone Charter the members of the Legislative Committee are the Chairperson, the President of the Association, the Vice President of the Association and two members of the Association chosen by the Legislative Chairman.

The Legislative Committee for 2016 consists of:

Steven Janney, Chairman

Chad Barger, Co-Chair

(member appointed by Legislative Chairman)

Cliff Jacobs, CALSPRO President

Larry Kirlin, CALSPRO Vice President

Tom Alkema, (member appointed by Legislative Chairman)

Our most recent Legislative Committee meeting was held in Los Angeles on June 25, 2016. A report was given regarding the two pieces of legislation we are actively involved in. They are:

AB 2211, introduced by Assembly Member Linder. This bill modifies language as to how a writ being served by a registered processed server is opened with any sheriff in the State of California. Existing law establishes a process for the enforcement of money judgments, and

authorizes a registered process server to levy under a writ of attachment or writ of execution on specified types of property. Existing law requires the registered process server, before levying under the writ, to deposit a copy of the writ with the levying officer and pay a specified fee. Existing law also permits a registered process server to serve an earnings withholding order on an employer and requires that the process server deposit specified documents with er and pay a specified fee. 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. We happy to announce that this bill has been enrolled and sent to the Governor for his signature.

AB 2244, introduced by Assembly Member Gatto. This bill deals with efilng costs being recoverable and identifies agents of the court and allows them to impose a fee for payment by credit or debit or electronic funds transfer, This bill has passed the assembly and is currently scheduled for a hearing in the Senate Appropriations Committee on August 01, 2016.

Our Legislative Advocate Michael Belote gave a short update on SB 1445 – sales tax on services. He expects no law to be enacted this year but shared thoughts about what is coming. Sales taxes on service will continue to be discussed every year. Implementation is complicated and has many proponents as well as opponents. Mike added that he expects on the ballot this November an initiative to extend the sunset on the income tax surcharge for 12 years.

Discussion has begun on a potential legislative agenda for 2017. Potential projects could include our registration requirements and who oversees along with continued projects with the Judicial Council and the Committee for Improving Court Access. We look forward to continuing discussions on the future at our 2016 Conference.

We believe that 2016 will be a positive year for CALSPRO legislation. The committee thanks the membership for allowing them to serve this year and looks forward to 2017.

CALSPRO 48TH ANNUAL CONFERENCE

CHANGE, CHALLENGE, OPPORTUNITY



OCTOBER 7-9, 2016
SAN FRANCISCO AIRPORT
WATERFRONT MARRIOTT

 **CALSPRO**
California Association of
Legal Support Professionals



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 \$50⁰⁰ per person. No refunds will be allowed for cancellations received after September 25th.

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150

Sacramento, CA 95833

(916) 239-4065 - phone • (916) 924-7323 - fax

www.calspro.org • info@calspro.org

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.

20TH 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

\$125⁰⁰ per person; includes green
fees, cart, and buffet lunch.

*Registration cutoff September 23rd.
Register Now.*



Awards for

1st, 2nd & 3rd 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 .**



20TH 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 16, 2016. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in come 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

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

7:00 AM – 8:30 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 Apex Legal Services 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 George Knecht of Green Filing.

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

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 • 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 16, 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.

Checks made payable to CALSPro (address above) or you may fill out the credit card form to the right and

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:

(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:

(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: \$ _____

* 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



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



Each 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

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



CALSPRO Advertising Update

By Robert Porambo, Advertising Chair

We have added a new button which is displayed prominently on our CALSPRO home page with the goal of continuing support for our Vendor members. Our Vendor members are a key component of our Association and we should always consider supporting these valuable partners whenever possible.

I would like to welcome our newest Vendor member Gorilla Stationers:

"Gorilla Stationers has been servicing businesses and government agencies throughout the country since 2012 with diligent customer service in addition to our knowledge of all products within the office solutions industry. From paper clips, to promo items, to business machines – we have it. We give new meaning to the phrase 'single source.'"

The Advertising Committee is also excited to announce our new advertising rates approved by your Board of Directors on June 25, 2016. We dramatically reducing the rates to make advertising much more affordable. We have included our old rates along with the new rates for comparison purposes. If you currently are an advertiser, please let us know. We will adjust your current terms accordingly by extending your agreement at no additional charge. If you would like to take advantage of these new rates please let me know.

Company Members:	Current Cost:	New Cost:
Featured Member Banner Ad:	\$600.00	\$300.00
Enhanced Member Listing:	\$200.00	\$100.00
Newsletter Business Card 1x:	\$60.00	\$50.00
Newsletter Business Card 4x:	\$180.00	\$150.00
Newsletter ¼ page ad 1x:	\$85.00	\$60.00
Newsletter ¼ page ad 4x:	\$280.00	\$200.00
Newsletter ½ page ad 1x:	\$135.00	\$100.00
Newsletter ½ page ad 4x:	\$480.00	\$300.00
Newsletter Full Page ad 1x:	\$240.00	\$200.00
Newsletter Full Page ad 4x:	\$900.00	\$600.00
Directory 1/8 page:	\$110.00	\$50.00
Directory ¼ page:	\$145.00	\$75.00
Directory ½ page:	\$290.00	\$150.00
Directory ¾ page:	\$400.00	\$250.00
Directory Full page:	\$520.00	\$300.00
Directory Inside Back Cover:	\$690.00	\$500.00
Directory Inside Front Cover:	\$750.00	\$600.00
Directory Back Cover:	\$920.00	\$750.00

Associate Members:	Current Cost:	New Cost:
Featured Member Banner Ad:	\$600.00	\$300.00
Newsletter Business Card 1x:	\$60.00	\$50.00
Newsletter Business Card 4x:	\$180.00	\$150.00
Newsletter ¼ page ad 1x:	\$85.00	\$60.00
Newsletter ¼ page ad 4x:	\$280.00	\$200.00
Newsletter ½ page ad 1x:	\$135.00	\$100.00
Newsletter ½ page ad 4x:	\$480.00	\$300.00
Newsletter Full Page ad 1x:	\$240.00	\$200.00
Newsletter Full Page ad 4x:	\$900.00	\$600.00
Directory 1/8 page:	\$110.00	\$50.00
Directory ¼ page:	\$145.00	\$75.00
Directory ½ page:	\$290.00	\$150.00
Directory ¾ page:	\$400.00	\$250.00
Directory Full page:	\$520.00	\$300.00
Directory Inside Back Cover:	\$690.00	\$500.00
Directory Inside Front Cover:	\$750.00	\$600.00
Directory Back Cover:	\$920.00	\$750.00

Vendor Members:	Current Cost:	New Cost:
Logo/Link CALSPRO bottom Website:	\$1,500.00	\$300.00
Newsletter Business Card 1x:	\$60.00	\$50.00
Newsletter Business Card 4x:	\$180.00	\$150.00
Newsletter ¼ page ad 1x:	\$85.00	\$60.00
Newsletter ¼ page ad 4x:	\$280.00	\$200.00
Newsletter ½ page ad 1x:	\$135.00	\$100.00
Newsletter ½ page ad 4x:	\$480.00	\$300.00
Newsletter Full Page ad 1x:	\$240.00	\$200.00
Newsletter Full Page ad 4x:	\$900.00	\$600.00
Directory 1/8 page:	\$145.00	\$75.00
Directory ¼ page:	\$110.00	\$50.00

VENDOR LISTINGS

INSURANCE SERVICES

Stan Burns Insurance Services, Inc.

Phone: (800) 491-7655

Stan Burns Insurance Services provides ALL commercial business insurance products for companies involved in the process serving, court filing, photocopy and attorney service industry.

Lanterman Insurance Agency, Inc.

Phone: (562) 912-4364

Your benefits consultant and HR Partner for All of California. We are proud to meet your organization's health insurance needs and we're continually seeking new ways to deliver even greater value to you. With that in mind, Lanterman Insurance Agency, Inc. has partnered with some of the nation's leading business service firms to offer a suite of automated Benefits Administration, HRIS and Payroll processes to our clients.

MARKETING

ServeNow.com

Phone: (877) 737-8366

ServeNow.com is a prescreened network of local pre-screened process servers. Our primary goal is to help paralegals, law firms, collection firms and other legal professionals find qualified process servers. We are the most visited and trusted resource for process servers on the web.

OFFICE SUPPLIES

Gorilla Stationers

Phone: (714) 845-3969

Gorilla Stationers has been servicing businesses and government agencies throughout the country since 2012 with our diligent customer service in addition to our knowledge of all products within the office solutions industry. From paper clips, to promo items, to business machines – we have it. We give new meaning to the phrase "single source".

Bluebird Office Supplies

Phone: (888) 477-0700

Bluebird Office Supplies is a service-oriented local discount office supplies warehouse serving a variety of businesses and office environments. We specialize in legal, medical, and accounting office supplies.

Sharp Business System

Phone: (619) 258-1400

Network IT Management - Printer Fleet

SOFTWARE SOLUTIONS

Journal Technologies, Inc.

Phone: (949) 280-0768

Case management solutions for the justice community. We have been providing case management systems to government agencies for more than 25 years and serve over 500 courts and justice agencies in 41 states and internationally.

Tristar Software

Phone: (805) 227-1213

Based here in California, Tristar Software has been providing industry leading software to all facets of the legal support industry for over 25 years. From Process Serving, to legal Courier, to Document Retrieval and Investigations, Tristar stands alone as the only complete Attorney Service software solution."

California Association of Legal Support Professionals 2016 Calendar of Events

October 8, 2016

Board of Directors Meeting

Conference
Northern California

October 7-9, 2016

CALSPRO 48th Conference

San Francisco Airport Marriott Waterfront

December 3, 2016

Board of Directors Meeting

Legislative Committee Meeting
San Jose

CALSPRO 48th Conference

October 7-9, 2016

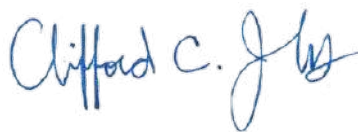
San Francisco Airport
Marriott Waterfront
1800 Old Bayshore Highway
Burlingame, CA 94010
650.692.9100

Please check the CALSPRO website for a complete listing of all events, including CCPS Workshops and Exams. www.calspro.org

provide similar evidence of compliance to be considered eligible for receiving work from these law firms. This can be seen as both a burden or as a great opportunity for any of our members, large or small, to get ahead of the curve and establish policies and practices which align with being qualified and in compliance and therefore eligible. If you were already planning on attending Conference this year, you will benefit greatly from this presentation; and if you are on the fence, or unsure about attending, this one educational presentation is reason enough to make the commitment to attend Conference this year. There will also be additional educational opportunities at Conference focused on providing value to your business, as well as networking opportunities, and exhibitors interested in showing you their latest and greatest solutions for legal support professionals. Did you know that we also have Vendor members specifically committed to providing service and value to you and your company? If you're not sure, we have made finding CALSPRO VENDORS easier than ever by placing a [link](#) to

them directly in the center of our home page. These Vendor Members provide Insurance Services, Marketing Services, Software Solutions and Office Supplies, so take advantage of their services and the savings they provide to you as a member. And speaking of savings and value, there is still ample time for you to take advantage of our membership Referral Program. This program not only affords you with the opportunity to provide a substantial discount to a potential new member that you refer, it also substantially reduces your renewal dues this coming January.

It has truly been a privilege and profound honor serving as your President for the past 21 months. We have continued to grow as an Association in many ways, and are fully engaged and at the cutting edge of our industry, protecting, preserving and promoting our profession.



Clifford C. Jacobs,
CALSPRO President



CALSPRO COMMITTEES

ADVERTISING

Robert Porambo – Chairman
619/685-4223
rporambo@knoxservices.com

ASSAULT ADVISOR

Larry Kirlin
559/223-1993
lkirlin@firstlegalsupport.com

BY-LAWS

Brett Peters
805/650-9077
brettp@janneyandjanney.com

CONFERENCE

Ken Hastings – Chairman
951/296-2669
service@hastingspps.com

CONTINUING EDUCATION

Cliff Jacobs – Co-Chair
415/475-6213
cjacobs@onelegal.com

DISPUTE RESOLUTION

Chad Barger – Co-Chair
661/327-8022
cbarger@attorneyscertified.com

DISPUTE RESOLUTION

Jeremiah Jones – Chairman
877/353-8281
jeremiah@boscolegal.org

FORMS

Tony Klein – Chairman
415/495-4221
tony@attorneyserviceofsf.com

LEGISLATIVE

Steve Janney – Chairman
213/628-6338
steve@janneyandjanney.com

MEMBERSHIP

Cliff Jacobs – Chairman
415/475-6213
cjacobs@onelegal.com

NEWSLETTER

Wendy Bowman – Chairman
408/295-3300
wendy@sterlingmadison.com

TECHNOLOGY

Michael Kern
213/483-4900
mkern@directlegal.com

WEBSITE

Michael Kern
213/483-4900
mkern@directlegal.com



The Right Approach

by Kristian Pujol and Larry Kirlin

Safety should always be first in mind for process servers when attempting each and every service of process. If a defendant becomes hostile or a situation dangerous, avoiding an assault should be the number one goal. In a previous article we acknowledged that learning self-defense techniques made sense as process servers naturally expose themselves to danger at times, and we underscored some of the secondary mental and physiological benefits associated martial arts classes and techniques; but it is of utmost importance to reiterate and remember that the best defense is to avoid being attacked in the first place! Self-defense is only a last resort when being physically attacked and should be only practiced in order to protect yourself and stop the attacker from causing anyone harm. One consequent drawback of engaging in self-defense is that it makes it more difficult to prosecute the crime if the process server fights back and sometimes, depending on the degree of harm inflicted or reasonable amount of force used, charges may also be brought against the process server. It is therefore always imperative to avoid an eminent assault when possible and leave as quickly as you can and document the occurrence.

At last year's annual CALSPRO conference in Las Vegas, we had a table discussion on the topic of Assault where several very well respected and seasoned association leaders strongly emphasized that the key for avoiding an assault is just having the right approach. This approach should be one conveying professionalism, docility, and integrity. A friendly demeanor and an honest answer why you are there typically work. No one likes a liar, and when servers feign to get someone to the door the probability for an escalated confrontation dramatically increases.

At most, an assertive but cordial tone of voice with a vague reason why you are there (such as for example: due to a "personal matter") usually does the trick in getting the subject to open the door and identify themselves.

It is of no surprise that many problematic services involving police calls and assaults are typically correlated with particular types of servers who have a distinctly strong aggressive character and, sometimes, even an attitude or a condescending disposition while serving. It always seems to be the same server with a chip on their shoulder who has issues with people and gets into trouble and/or puts themselves in danger. They need to rethink their approach, lose the attitude, and declare service in an impartial way. It is for this important purpose of having a good approach that the senior members at the round table discussion further admonished that carrying a weapon (such as pepper spray, gun, or knife) is not a good idea since it may psychologically alter the attitude of the server and give them a more aggressive and authoritative approach. Simply wearing a process server "badge" while serving residences at night, although very professional during business hours when serving offices and hospitals, may actually be counterproductive and give the server a false sense of authority and unknowingly put them at a disadvantage or in unnecessary danger (when the defendant is trying to evade the police and is a violent offender or drug addict). Avoid the props, ruses, and weapons, and just take the time to serve papers with the right attitude and approach. To begin with: know what you are serving (this will help you anticipate what type of response you might receive). Know the neighborhood where you are serving (be street smart) and

dress for the occasion. And lastly, be courteous and professional at all times. This is a good and safe approach with a commonsense methodology. Sure nothing is guaranteed because there are cruel and angry people out there who are going to verbally assault the process server no matter what approach they use. These are the people we must be wary of and careful with since they are literally poking their fingers and words at the process server hoping they stoop down to their level and "talk back" or do something to provoke them such as take a picture of them or give them an obscene hand gesture. It is for this small group of troublemakers that the process server has to take extra care to create a measure of calmness, reassurance and professionalism when serving legal documents.

A good RPS with solid experience and expertise will be wise to have the right attitude, knowledge, and appearance when attempting each and every service, and their approach should be friendly, polite, and professionally to the point. A wise man who has been serving papers for many, many years said at our table discussion that it is his goal every time he serves papers to make the person whom he is serving "thank him" before he leaves the premises. This should be every process server's aim and guiding principle behind their approach. Be professional, resourceful, and detached but helpful. Taking the time to show a witness or a defendant the date on a subpoena or the instructions on the summons after being served is simple and it helps them feel more comfortable and agreeable to due process. Moreover, this approach helps ease the situation, assuages the pain of being served, and most importantly avoids unnecessary conflict.



Hired and Non-Owned Auto Liability Insurance What it is and why you need it.

Do you have employees who occasionally use their personal vehicles for business errands? If yes, you'll need **Hired and Non-Owned Commercial Vehicle Insurance** to protect your business. That's right, even if it only happens occasionally, like when an employee is making a bank deposit for the business, or grabbing lunch for a staff meeting, your business is at risk.

Imagine this scenario ~

Your employee races off to the bank to make a deposit. It's raining and the road is slippery... he ends up causing an accident with injuries or even death. Your company could be found liable and could face damaging lawsuits. The bottom line is that even when an employee is driving their own car, if they are doing business for the company you need Hired and Non-Owned Commercial Vehicle Insurance to protect your business. It is very low-cost but invaluable coverage when needed.

AND... if it's the case that an employee has rented a vehicle for company business, Hired Auto Commercial Vehicle Insurance will provide protection in the event of an accident. Keep in mind, however, that if an employee is consistently using their own vehicle to conduct company business, that vehicle should instead be registered under the business' Commercial Auto Policy.

And one last thing ~.

It is important to note that Hired and Non-Owned Commercial Vehicle Insurance coverage does not replace an employee's existing personal auto coverage. The employee is primarily

responsible for ANY accident and their personal policy will always be the primary coverage source. Hired and Non-Owned Auto Liability will protect the business, BUT NOT THE EMPLOYEE!

Call us today to put a plan in place to protect your business. I provide all types of insurance at www.stanburns.com.

Workers Comp – Group Health – Commercial Auto – Homeowners – Business Package Policies - Apartments – Rental Properties – Motorcycles – Boats – Collector Cars – Condos – Special Events

Stan Burns Insurance Services, Inc
800-491-7655 x114
Tom Burns - President
PO Box 3309 Torrance CA 90510
(P) 800-491-7655 x114 (F) 310-618-6983
tom@stanburns.com
www.stanburns.com

Serving California since 1965. "...where the BUSINESS of INSURANCE is PERSONAL..."™

FOR Sale: **Zip Codes**

1-800-PROCESS

Is Offering Zip Codes For Sale.

If You Purchased The Zip Code, Anyone From Anywhere Can Directly Connect With Your Office. No Middle Man Is Involved. You Negotiate Your Own Deal With The Caller. No Call Center, No Commissions, No Sharing The Wealth. Anyone That Calls 1-800-PROCESS, Clicks Or Calls The Zip Code Purchased And They Are Directly Connected With You. Simple, Effective And Totally Owned And Controlled By You.

***You Own A Piece Of 1-800-Process Through Zip Codes.
All Calls Going To Your Zip Code
Go Directly To You With A Direct Connect.***

Interested?

***Go To 1800PROCESS.com
Or Call Doug Kramer At
1 800-687-0130 For More Information***



Coalition Update

by CALSPRO Delegates

Progress continues throughout the State as a number of courts progress with electronic filing. Here's some stats per a recent Tyler update:

- Tyler courts are receiving approximately 1,350 eFilings per business day
- Courts live so far:
Fresno
Kern
Kings
Merced
Monterey

San Luis Obispo
Santa Barbara
Santa Clara
Santa Cruz
Orange

- There are 4 certified EFSPs including Tyler

On other fronts, alternate forms of payment have been on the Coalition's agenda from the beginning, so this development is of particular interest. Taking a step back, we have, up to now, had the options of utilizing cash, checks and credit cards to file documents at court. The electronic

filing system creates a challenge in terms of traditional payment methods. At this point, in order to use the Odyssey system, we are restricted to credit cards. However, change seems to be on the horizon. There are now two courts working through the process to accept electronic checks. This involves merchant ID validation by Chase. Fresno and Santa Cruz County are currently processing this validation. Merced and Monterey appear to also be moving in that direction. It is a great start on a trend we hope will spread throughout the State.

CALSPRO 2015 - 2016 Officers

PRESIDENT **Cliff Jacobs**

415/475-6213 – ph
866/420-1541 – fax
cjacobs@onelegal.com

VICE PRESIDENT **Larry Kirlin**

559/233-1993 – ph
888/943-1355 – fax
lkirlin@firstlegalsupport.com

SECRETARY/TREASURER **Robert Porambo**

619/549-4853 – ph
619/685-4294 – fax
rporambo@knoxservices.com

2015 - 2016 Board of Directors

Tom Alkema

909/594-5995 – ph
909/598-2308 – fax
talkema@ronsins.com

Chad Barger

661/327-8022 – ph
661/327-8179 – fax
cbarger@attorneyscertified.com

Wendy Bowman

408/295-3300 – ph
408/491-9772 – fax
wendy@sterlingmadison.com

Ken Hastings

951/296-2669 – ph
951/296-2770 – fax
service@hastingspps.com

Steve Janney

213/628-6338 – ph
213/483-2576 – fax
steve@janneyandjanney.com

Michael Kern

213/483-4900 – ph
213/483-7777 – fax
mkern@directlegal.com

Larry Kirlin

559/233-1993 – ph
888/943-1355 – fax
lkirlin@firstlegalsupport.com

Mark Manchester

805/658-8454 – ph
805/658-8628 – fax
mark.manchester@rezacmeyer.com

Robert Porambo

619/549-4853 – ph
619/685-4294 – fax
rporambo@knoxservices.com

Kristian Pujol

805/650-9291 – ph
805/658-8170 – fax
kris@comproserve.net

Lauri Taylor

661/324-8018 – ph
661/324-0451 – fax
lauri@amslegal.net

Legislative Advocate **Michael D. Belote, Esq.**

Administrator
Jennifer Blevins, CMP
jennifer@caladmanagement.com

Membership/Co-Administrator
Stephanie Schoen
stephanie@caladmanagement.com

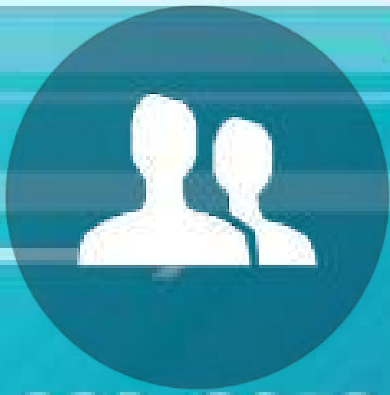
Publications
Nathan Carlson
nathan@caladmanagement.com

Webmaster
Michael Cochran
michael@caladmanagement.com

Advertising /CCPS
Natalie Thurn
natalie@caladmanagement.com

Accounting
Tricia Schrum, CPA
tricia@caladmanagement.com

**California Association of
Legal Support Professionals**
2520 Venture Oaks Way, Suite 150
Sacramento, California 95833
Phone: (916) 239-4065 • Fax: (916) 924-7323
Web site: www.calspro.org
E-mail: info@calspro.org



CALSPro Membership Update

By Cliff Jacobs, Membership Chair

It is more than halfway through the year and conference is just a few months away. After that holiday season is upon us, and before we realize it a new year has begun. Now is a great time to take advantage of some of the membership benefits that we offer.

Did you know that you can reduce your annual dues at renewal time this coming January simply by referring new Individual and Company members. The savings are significant too. In addition, as a member in good standing, you can offer these referrals a discount to become a CALSPro member, which is definitely a Win-Win situation.

Another benefit that you can still take advantage of this year is through our Vendor members, who are committed to providing value and service to CALSPro members to enhance your business and provide opportunities for you to be even more successful. If you have not seen it yet, there is a great tab in the center of our home page that will take you right there.

Are you a CCPS? For those that may not know this, CALSPro has been providing Process Server education, training and Certification since 1984. CCPS stands for CALSPro Certified Process Server, and is a distinction that you can be very proud of. To become a CCPS designee, you must answer 40 out of 50 questions on the CCPS exam that is given at each CCPS Workshop, and also given at our annual conference. This is part of a

Continuing Education program that has truly evolved over the past 10 years; and if you have not taken the Workshop, or sat for the exam in several years, you will really be impressed with what it has become. The CCPS designation lasts for 2 years and then you can test again to continue as a designee. The best part is that CALSPro members receive a discount of between 50% and 65% off

the registration fee depending on your membership category, so why not get certified?

Finally, we want to hear from you, so please don't be shy. Send your suggestions about what we can do to enhance your membership experience to info@calspro.org.



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