

President's Update - Larry Kirlin



We're Off to a Strong Start

In keeping with my goals for 2017-2018, our committees are off to a strong start. I've met with each of our cornerstone committee chairs to discuss their individual goals and make sure we don't lose any momentum. Here is a glimpse of what is going on around the association: Mark Manchester already has the wheels in motion for our 50th Anniversary Conference in Sacramento. His committee is working with Andy Estin and the Historical Committee to create an unforgettable event. Mark your calendars now (October 5-7, 2018) and be sure to invite your family.

Andrew Gowing and the Continuing Education Committee are gearing up for a full season of CCPS classes. The course materials will undergo a full review after the new laws go into effect on January 1st. Keep your eye on the Events page on the website to locate a class near you.

Chad Barger is starting his rookie year as the Legislative Chair. His committee already met to formulate their agenda for the 2018 season. Tom Alkema is leading a sub-committee specific to the Photocopy industry. Without letting the cat out of the bag, I'll tell you that we have some great stuff brewing for next year.

Kristian Pujol and the Membership Committee have the wheels in motion for the most important membership drive since CAPPs became CALSP^{ro}. Not only do they have to

educate our existing members on the benefits of the new membership categories, they are going to need to add at least 30 new members to our ranks.

Robert Porambo recently reestablished the long lost Area Governor program. He gave his governors specific goals, including direct contact with each member and regional social events. We are going back to the formula that made the association into the family it is today. The list of Area Governors will be posted on the website shortly.

Last but not least, I want to be the first to pass along some great news about our 2017 Annual Conference. Thanks to hard work and a sharp pencil, Ken Hastings and his committee were able to generate a profit on the conference for the first time in many years. Thank you Ken for keeping your eye on the bottom line while organizing the best conference in recent memory. Congratulations!

Thank you,

Larry Kirlin, CALSPro President

2017 Conference Wrap-Up: Members Make Significant Changes

The recent CALSPro 49th Conference held at the beautiful Omni Rancho Las Palmas Resort in Rancho Mirage was a tremendous success. Thanks to the Conference Committee, chaired by Ken Hastings, and President, Larry Kirlin, for creating an outstanding program with informative education sessions, a productive business meeting, and great social and networking opportunities. We appreciate the support of the exhibitors, sponsors, speakers and attendees, whose participation contributes greatly to the success of the conference.



During this year's business meeting, members in attendance voted on two significant bylaw amendments that will change the infrastructure of the association. The first change is to the area of nominations and elections to the Board of Directors and Officer positions. Until now, only members in attendance at the Annual Business Meeting can nominate and elect the leadership, leaving those members who are not able to attend the meeting unable to participate in the election process. In order to involve the entire membership in this important process, the members voted to approve the bylaw amendment which will now allow nominations and elections to take place outside of the conference. A Nominating Committee will be formed to engage the entire membership in the importance of becoming a leader, and develop a slate of nominees to be presented to the members for vote, prior to the conference, via ballot.

The second change is to the membership criteria with the elimination of the Company and Individual Member categories and the addition of the Active Member and Independent Contractor Member categories. These changes will present the entire membership with more opportunities to participate in various programs. Additionally, effective with 2018 membership

dues, members will be able to pay their dues via an affordable automatic monthly credit card payment.

We are very excited about the changes the members made at the Conference, the energy and engagement of the membership, and we look forward to a successful future. Please watch your e-mail and the CALSPro website and blog for further updates. Also, please see below regarding the building of a CALSPro App - a new, member's only benefit that will launch in 2018. Many thanks to Kristian Pujol for taking the lead on this project. Thank you for your membership.

Affiliate of the Year Award

The CALSPro Board of Directors wishes to congratulate all of the 17 companies nominated for Affiliate of the Year 2017. These remarkable attorney services from Northern and Southern California went above and beyond the call of duty for their clients and set a very high standard for our industry. We would also like to thank the many members who submitted their nominations and provided testimonials about their nominees for CALSPro's Affiliate of the Year award.



At this past CALSPro Annual Conference attendees voted at the general meeting, votes were tallied, and the winners were announced at the Saturday night Banquet. Commercial Process Serving Inc. was voted as the Best Affiliate from Southern California and Sterling Madison was voted as the Best Affiliate from Northern California. Congratulations to both amazingly hardworking and trustworthy companies! Bravo!

And the final vote and honor for THE BEST OVERALL AFFILIATE OF THE YEAR was awarded to COMMERCIAL PROCESS SERVING INC! Congratulations to the Pujol brothers! Kristian Pujol and Sal Pujol accepted this first ever CALSPro award with much enthusiasm, pride and joy! They greatly appreciated the top recognition of their peers and are CALSPro's Best Overall Affiliate of 2017! Congratulations!

Best Affiliate in Northern California



Sterling Madison Company
Trusted Professional Legal Support

Best Affiliate in Southern California
 **COMMERCIAL**
PROCESS SERVING, INC.

Best Affiliate Overall



EXTRA! EXTRA! READ ALL ABOUT OUR NEW MEMBERSHIP RATES & CATEGORIES!

Kristian Pujol, Chair
Membership Committee

As a result of the Strategic Planning Summit in July and the subsequent bylaw amendments voted for unanimously at this year's annual conference, we no longer have the company member or individual member categories as part of CALSPro's membership structure. Instead we have now created two new categories in the spirit of improving benefits, enlarging voter participation, and increasing overall association membership! We have simply lowered the costs and increased access to benefits!

The new **Active Member** category costs only \$350.00 per year and is a hybrid of the old two categories. You get voting rights and the ability to run for office (like the old individual member) AND pouch access if you want to join the pouch (like the old company member)! You will have exclusive access to the members only page, as well as the upcoming CALSPro mobile app (as seen at the annual conference)! Some benefits include: voting, pouch access, enhanced website listing, advertising, mobile app, and ALL the previous company member and individual member benefits! You may choose to pay your dues as a monthly fee of \$29.95, automatically charged to your credit card on file. It's a no-brainer!

The second option and brand-new category is the **Independent Contractor** member which allows individuals to join CALSPro for \$120.00 per year or only \$9.95 per month! This type of membership is for any independent wanting to join the association and advertise their services to Active members. The new IC member will have a listing viewable only to the active members (in the members only page) and will also be entitled to some member privileges such as newsletters, alerts, special events, discounts for CCPS workshops and access to the new upcoming CALSPro mobile app!

Take advantage of these **new rates** and help us by signing up more employees, photocopiers, independent contractors, private investigators and others to enjoy CALSPro membership benefits while increasing our legislative strength, as we boldly jump forward into the foreseeable digital era expansion of communication, e-voting, education, and credit card payment automation! Sign up now without hesitation!

Legislative Committee Report

Chad Barger, Chairman

After years of serving on the Legislative Committee, I'm excited to be asked to serve as chairman. Legislation and the business of politics has always interested me. I'm looking forward to working with our lobbyist, Michael Belote, and the committee to protect, preserve and promote our profession.



Understanding the importance of this committee, I've asked some of the best minds in the business to serve with me. Tony Klein, Mike Hylan, Andy Estin and Tom Alkema (Photocopy Ad Hoc) have agreed to join the committee. We also have the pleasure of having our Vice President, Robert Porambo and President, Larry Kirlin on the committee, as per our policies and procedures.

Since the formation of CAPPS/CALSPRO in 1969, our association has done a great job protecting our profession. From the defeat of numerous mailing bills, to working with authors to remove wording that would have imposed fines of \$10,000.00 to \$25,000.00 for serving the wrong person at a bad address. CALSPRO has been there every step of the way. If you haven't looked at our legislative history lately, take a look today. I think you'll be impressed. <http://calspro.org/legislation/legislative-history/>

As we gear up for our first meeting, we're looking at several proactive ideas for the process serving and photocopy professions. I look forward to updating you on our agenda and progress in the months to come.

Continuing Education Upcoming Workshop

San Jose - Saturday, January 27th, 2018
9:30 A.M. - 4:00 P.M. - Workshop and Exam

This workshop will feature a comprehensive study of the primary California process serving codes, and all the information needed to pass the CCPS exam. In addition to the standard workshop, this seminar will include a portion dedicated to the beginning or inexperienced process server.

Rancho Santa Teresa Mobile Home Estates Clubhouse
510 Saddle Brook Drive
San Jose, CA 95136

CALSPPro Area Governors

Robert Porambo, Vice President

As CALSPPro approaches our 50th anniversary, your president and board of directors are excited to implement the old Area Governor program. Each board member will be assigned an area and/or region to represent our members. Your governor will be your conduit to the board and also assist with keeping you posted on relevant news, issues or events.



They will also assist in membership, CCPS workshops and will be an ombudsman to new members. This is a great avenue to keep open lines and improve communications for all members. Every member in CALSPPro has a voice, and this is a great avenue for your voice to be heard.

Depending on your area, we want to set up at least one social type gathering each year, which will allow members to rub elbows with fellow CALSPPro colleagues.

In the very near future, your assigned area governor will be personally contacting you and this will be a great opportunity for you to pass on any feedback or issues you want to have addressed.

We look forward to this being a great program moving forward, keeping CALSPPro a strong association for years to come.

Automate Your Business and People Processes

Mike Lanterman

Do you remember the days when you conducted business without cell phones? How about fax machines? The cutting edge Process Servers had drivers on manual routes with Thomas Brothers Maps and pagers. That was considered to be best practices. The Legal Support Professionals Industry has come a long way from those "good old days."

New technology and ever evolving software has resulted in tremendous economies of scale for the industry. The rapidly evolving functionality has enabled companies to leverage these best practices. This has resulted in reduction of inefficient manual processes, faster turn around times, and in many cases reductions in force (less employees can execute the company mission).

Core Competencies are more efficient and this is delivering to the organization's bottom line. Yet, many companies remain in the "good old days" regarding their Human Resources processes and Employee Benefits. Why?

Employees still fax insurance enrollment forms to HR. Poor legibility and missing data is a great source of frustration and time wasting for HR and Benefit Managers. New employees still get their Employee Benefits in a big envelope or folder with a hodgepodge of forms and flyers, which they never read.

Employee On Boarding is still done with paper and pen. Multiple forms (I-9s, W-2s, Employee Hand Book Signature Page etc...) are reviewed and filled out with the hiring manager or HR specialists.

Just as you have invested in automating your Core Competencies in process serving and other areas, you should also invest in automating your People Processes. New software allows employers to "On Board" new hires electronically. Employees fill out I-9s, W-2s, and sign Employee Hand Book acknowledgement pages online via Verisign, Doc U Sign, or other e signature software.

After On Boarding, many software programs continue this automation with Employee Benefits enrollment. Fillable PDF forms are downloaded and sent to brokers or insurance carriers regarding the new employees benefit selections. Reports are then uploaded or forwarded to the payroll provider regarding payroll deductions. This automation has streamlined Human Resource practices and reduced errors.

Many of these software programs can cost \$4.00 Per Employee per Month (PEPM) to high end HRIS systems that cost \$12.00 PEPM. Some systems allow you to automate Employee Benefits Enrollment only (without On Boarding) for as little as \$2.00 PEPM.

Your insurance brokers should be providing these tools to you at no cost. The Insurance Brokerage Industry is at a technological cross roads. There are those insurance consultants that defend the "good old days" and rely on the personal relationship of the client to trump technological deficiencies. There is also a segment of the industry that is embracing technology to better serve their clients. Some charge fees and some pay for these fees for the client out of their insurance carrier commissions.

Regardless of who pays, the bottom line is that Legal Support Professionals should automate and streamline their employee practices just as they do their client practices. Automating your People Processes and your Business Processes will add more to the bottom line and protect you from compliance violations and other issues resulting from errors or omissions.

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If you have an article or information you would like to share with fellow members, please email Newsletter Chair, Anita Pasillas at apasillas@rapidlegal.com. Thank you.

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