



CALSPRO PRESS

THE OFFICIAL QUARTERLY NEWS & OPINION MAGAZINE OF THE
CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS

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LEGISLATION

■ **Stop 984**

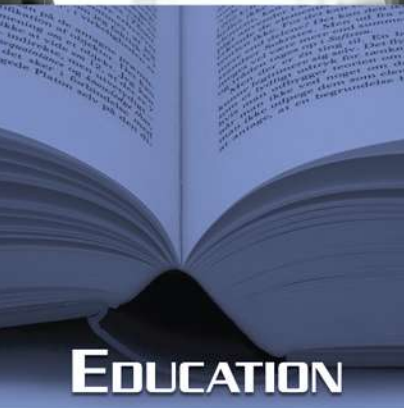
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MEMBERSHIP

■ **“Supporting Member”**

A proposal for a new membership category.



EDUCATION

■ **Process Serving Applications**

A focus on smart phone technology.



CONFERENCE

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CALSPRO

42nd Conference

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your fellow Legal
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Conference in Palm
Springs, October 8-10.**

**Details and
Registration
on pages 11-14**

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PRESIDENT'S MESSAGE

STEVE JANNEY

2009-2010 CALSPRO PRESIDENT

These last 18 months have been filled with a variety of issues and discussions regarding the future of the legal support profession both in California and nationwide. We have heard of the investigation of process servers in New York. Process servers were mentioned prominently in hearings held by the Federal Trade Commission. In Sacramento a legislator told me to my face "Your industry needs more regulation."

These are serious times and we see this playing out in the Legislature here in California and in other states in the Union as we speak. However, we may well find that the greatest danger to our profession is not from external sources, but rather our greatest danger could come from within. When we have members of our Association ignoring the law and disregarding our Code of Ethics regarding the server's signature and how it's affixed on the proof of service, this can't just be seen as that member's problem. In reality, this places all of us in harm's way.

As quoted in our Code of Ethics, *"The proof of service is the evidence that a specific party and/or person has been properly served and is now under the jurisdiction of the court."* CALSPRO has worked hard to insure the presumption of accuracy on the proof of a registered process server. The California Evidence code states "the return of a process server registered pursuant to Chapter 16 (commencing with Section 22350) of Division 8 of the Business and Professions Code ... establishes a presumption, affecting the burden of

producing evidence, of the facts stated in the return." Basically this says the opposing counsel has to prove the proof incorrect, and not vice versa. By the way, this part of the evidence code was sponsored by CALSPRO and is another benefit of our Legislative Cornerstone.

"The proof of service is the evidence that a specific party and/or person has been properly served and is now under the jurisdiction of the court."

But today there are those who play "fast and loose" with the signature line on a proof of service. Process server's signatures are signed by other people. Process servers sign reams of blank proofs and allow them to be completed without their review. Signatures are stored in software programs and then affixed on proofs without the process server's permission or the server reviewing and verifying the information. These business practices are justified as being efficient and easy.

But efficient and easy often comes crumbling down when a process server is on the witness stand. The defense attorney asks the server "Is this your signature?" When the server says, "uh, no," suddenly all other information on the proof is suspect. And if one proof is suspect, are all proofs

from that server suspect? Suddenly, legal support professionals do not look so professional.

In New York all proofs of service from a specific process serving company were reviewed and thousands of judgments reversed. In San Diego, a process server testified that a signature was not his, the judgment was reversed and the process serving company sued. And unfortunately, suddenly all process servers are being painted with the same brush. The specter of litigation, whether individually or as a class action, suddenly becomes a reality because of a business practice that was efficient and easy.

Legal support professionals have a high degree of responsibility to insure the accuracy of the proof of service, including the signature of the registered process server. Our Code of Ethics state:

Proofs of service should only be executed after the registered process server has determined it accurately reflects his/her efforts and results. This would include any declaration of due diligence and declaration of mailing.

It is unethical for a person other than the actual server to sign a process server's name to a proof of service, declaration or any other document under the penalty of perjury. If a proof of service or any other related form requires to be notarized a notary should NEVER notarize anyone's signature unless the proof of service is signed in his/her presence.

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CAPITOL REPORT

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



The Finish Line, Maybe

Sometimes it seems like in modern California politics, none of the old rules apply anymore. Traditionally, for example, the Legislature would reserve the month of July for its summer recess, returning to Sacramento on or about August 1 for one final month of session. In even-numbered years, the state constitution requires that the Legislature adjourn by midnight, August 31; probably not coincidentally, this schedule allows legislators to be home for September and October to conduct campaigns for the November general elections.

Any more, this schedule is observed, as they say, "not so much." First of all, with the seemingly unending budget problems, the Legislature has pretty much been in continuous session for at least the past 18 months. Last year the ink on the state budget document was barely dry when key elements of the spending plan began to fall apart, necessitating more work on the budget over the fall recess. The Legislature returned to session in January with little or any break.

For this year, the July "recess" has been sort of a half-pregnant affair wherein legislators were sent back to their districts, awaiting word of progress on the state budget, and advised to be within four hours travelling time of Sacramento. So the summer hiatus has felt odd, sort of a half in-session, half-out kind of feeling. And, the budget mess has proceeded with little if any signs of progress.

So, as this column is written, the Legislature is days from returning to Sacramento for what would normally be the sprint to the finish, four final weeks of session before adjournment on August 31. Clearly the regular work of the Assembly and Senate can be completed by that time. The question is whether a state budget agreement will be in place by then, allowing legislators to head home for the fall as tradition and the state constitution provides.

The latest state budget in history was signed in the first week of September. Although there is great uncertainty, many predict that this year could set a new record. Beyond any interest CALSPro members might have in the state budget as regular citizens, the lack of a budget should be of great interest to us as attorney services. The state will literally run out of money within six to eight weeks, and support for all state programs, including courts, will be in great jeopardy. Without a budget in place, courts may look to conserve resources by reinstituting closure days, or severely curtailing counter hours.

Ultimately, the bigger question is whether the recently-negotiated court budget package will survive in the final state budget, whenever it is enacted. Under the leadership of the (retiring) Chief Justice, the Judicial Council has cobbled together a court budget package which includes AOC funds diversions, civil and criminal fee increases, and support from the state

general fund. If the package survives when the final budget is enacted, courts should be able to avoid closures, furloughs, and any extensive layoffs. Should the ultimate state budget visit further cuts on the courts, however, service interruptions are likely if not certain.

During the final month of session, CALSPro will also be working to defeat SB 984, which would limit the hours of the first attempt at the first paper in a civil action to between 7:00 am and 8:00 pm. As this column is written, the bill is pending a vote on the Senate floor, where a 2/3 majority vote is required. CALSPro will be working very hard to defeat the bill on the Senate floor, but should the bill be approved by the Senate, the fight will move to the Assembly Judiciary Committee, the floor of the Assembly, and ultimately the Governor if necessary.

With respect to SB 984, we have argued that the bill is unnecessary, since no evidence of abuse has been offered other than one anecdotal incident; unenforceable because there is no practical way to prove when a first attempt at service is made; and unfair because no one other than registered process servers can be subject to any penalties for violating the service hours.

All CALSPro members should watch for email updates on SB 984, and be prepared to call or write state legislators as requested on this misguided and unnecessary bill. 🐾



Q&A PRESENTING NEW TECHNOLOGY FOR THE PROCESS SERVING INDUSTRY

by Clifford Jacobs

2010-2011 Education Committee Chair

The following questions were put to four software vendors at the NAPPs Conference in Orlando earlier this year regarding their new technology for Process Serving, especially regarding smart phone apps. They provide a glimpse into the more high tech world of Legal Support. There are some basic similarities, but many more unique features in each of the applications that can enhance your operation. The full contact information for each of the vendors is provided at the end of the article. This legend represents the products/companies:

CM – CivilMap
www.civilmap.com

GT – Global Tracker
www.process-360.com/technology.html

TS – TrueServe
www.mytrueserve.com

LD – LoyalDog
www.loyalpuppy.com

1. What is the general overview of your product?

CM – CivilMap is a complete software package for process serving companies. Its primary purpose is to provide all the necessary tools to operate a process serving business and to train and communicate with its servers. It creates efficiencies, reduces risk and will give the business owner a competitive advantage. This is accomplished by CivilMap's web application which includes Invoicing, Reporting, Automatic Affidavit Generation, Client log-in, Due-date Alerts, and is enhanced by the CivilMap's iPhone application. This application provides time, date and location verification, optimized routing, Rules of Civil Procedure, Audio Capture, Helpful Hints for the process server and Skip Tracing requests as needed.

GT – Global Tracker was developed to help improve the flow of information between the process servers and their clients. It is all web-based and web-accessible, VeriSign Secure, allows for unlimited User Accounts,

and contains an intelligent accounting package with automated billing reports. Its primary use will be in tracking jobs and allowing multiple parties in the industry (law firm, production, process servers and even court clerks) to share information and follow up on jobs in process. It is a turn-key solution for process servers allowing them to enter attempts in the field using their smart phones or notebooks, and utilize GPS. They can print out the affidavits with the service information already populated, making it easy to just sign and notarize as needed. They can also upload file-marked copies and affidavits along with photos right into our system for accessing from any location using your log-in. Global Tracker has a multi-range of automated reports that keep the client informed on changes in status of their serves and allows the client and process server to email back and forth using our secure service. The flow of information between the parties improves, as does the quality of service. The most important uses aside from job tracking are:

Production of documents; the law firm can actually produce documents they need filed (Abstracts, Notices, Judgments etc.) and print them directly from Global Tracker.

- Status updates and messaging between the firm and the process servers in the field
- Custom affidavits and returns of service for every state or style based on individual operations
- Internal auditing of attempts and notes
- Error proofing of electronically imported jobs, and of exported updates and notes.

TS – TrueServe is a total business management package for running a small agency. It was designed with volume and power in mind. From our completely automated billing, commission and document assignment interfaces, you can pump out work

Continued on page 5

more efficiently and faster than your competition. With our Servertrak tools, global import and export functions and built-in export formats for most nationally used attorney software platforms, it will allow you to run circles around your competition. TrueServe offers complete accountability and transparency to your clients (attorneys) keeping them informed and up to the minute on all files at all times. Aside from our world-class software you will receive training, real support, available customization and proven marketing materials. You will never look at process serving software the same way again.

LD – LoyalDog is a total Process Serving solution for the Legal Support professional. It does true high-volume scanning, creates true fully customizable forms, provides charts and graphs of your data, and offers lightening fast native mobile apps (much faster than browser based). Starting 10 years ago as the first web app ever for process serving software, running on Internet Explorer, we were ahead of our time. Maintaining that edge our Windows UI (User Interface) lets your staff do things much faster than they could through a browser front end. Hotkeys allow them to do things in batches without even picking up the mouse. By sending the data into the Windows application and allowing the workstation to handle some things, we significantly minimize the traffic between the server and workstation, allowing for excellent productivity. The new trend in process serving is Photo/GPS from the mobile device, and LoyalDog has a native Android application, and is nearly complete with Android and iPhone native Apps. You can program the dropdowns with exactly what you want to select from. Your productivity increases and your affidavit prep time greatly decreases. You will “WOW” clients, or potential clients, when you show them the mobile app and graphical maps and reports that you can use (and they can download) to hold your servers accountable. Now is a good time to lead this trend in your area and use it to gain market share and be more efficient. Our super fast native mobile apps are finger friendly, using the phone’s own user interface, instead of a web browser. The process server can easily add in a new address to the job from a field

locate, and the server’s entire route can be reconstructed graphically. Also, the mobile app collects enough information for you to print out an affidavit; so your prep time plummets; and the Photo, GPS, attempt, and completion information easily export to other programs.

2. What are the tentative release dates of future compatibilities?

CM – Fall of 2010

GT – We are currently working on several new upgrades and features and expect an October 2010 release.

TS – No promises of any future releases as we keep them confidential until they are released.

LD – The very near future

3. Are there multiple versions available?

CM – CivilMap strives to provide all available amenities to every client. The underlying goal is to offer a good business decision whether you are a one man operation or a company with multiple offices.

GT – There is only one version with multiple levels and views, making it seem like there are different versions.

TS – There is a Pro version for most companies, an Enterprise version for larger companies, and a lite version which captures GPS verified, date and time stamped photographic images and stores them on your own password protected account on our server. Servers can sort them by date, job ID and more, and can print them for court appearances and proof when attorneys request it.

LD – For the high volume shop, it is of tremendous value to have documents and data flying back and forth with your high volume law firm clients. We currently do this over a dozen different ways and keep adding more and more methods depending on the specific client’s needs.

You describe how they want it, and we give you what your client wants, just the way they want it. As a result, you strengthen your relationship with them and can even gain market share.

4. What does your product cost?

CM – CivilMap’s pricing strategy is multi-tiered ranging from \$50-\$75 for less than 100 jobs entered per month to a negotiated rate for companies that serve 10,000 or more papers per month.

GT – Cost varies from \$100 to several \$1,000’s per month (with additional setup fees) depending on the level of service and custom features needed. We currently offer a basic solution for \$1,000 setup and \$129.99 per month on a 12 month contract. This solution includes our GPS feature, file upload program, 5 admin users, unlimited client access accounts and Process Server accounts.

TS – 1 - Pro version – \$300 per month for the first 1000 papers (1000 papers per month minimum) then \$.30 per additional paper, billed monthly.

2 - Enterprise version – \$39,999 plus above monthly costs.

3 - Lite version – \$79.99 per 1000 images.

LD – LoyalDog is \$350 per month for 6 workstations to subscribe. Additional workstations are \$25 per month or \$25,000 to purchase (unlimited workstations). That’s it. You don’t pay extra for more jobs or for web service/scanning features or mobile apps. It’s all included.

5. What sets your product apart from anything else in this market?

CM – CivilMap believes that providing such an intuitive and complete serving tool gives the server advantages not currently available elsewhere in the marketplace.

GT – Our solution is 100% web based, customizable, and scalable to meet

Continued on page 6

the needs of clients. You don't have to download or install anything. Just log in!

TS – We are the only product developed by a large scale process agency. We design all features with practical experience in mind and develop systems to limit the manpower necessary to perform the tasks that most Process Serving programs overlook. TrueServe will not release any new features until they are field tested on our own papers nationwide.

LD – One important distinction between LoyalDog and the other process serving software companies is our reputation for integrity, inventing things and getting things done. LoyalDog is no stranger to innovation. We've been doing it for 10 years as the first web app for process servers, the first mobile application for process servers, the first high speed automatic barcode recognition for process servers, etc. It is a long list of "firsts" and we're looking forward to many more. Another distinction is that Loyal Dog's Windows user interface is superior to our browser-based competitors. It's simply way faster. It lets your staff get more done in less time than they could through a browser front end. Also, Real-time attempt information can bridge directly over to the client; same for scanned docs, completion information, GPS information and photos.

For the techy folks, the current trend is using SQL databases, which are horizontally row oriented data stores that help you manage data with its own Structured Query Language. LoyalDog currently uses MySQL to manage data. This is important because MySQL is free, and as been the best bang for your buck for the past 10 years. It has blazing performance and easy backup, recovery and administration. Of all the databases, it is the easiest to use. The combination of MySQL and LoyalDog's XML architecture (which means it will communicate with anything) is an unbeatable combination, for now; but we found something even better.

We are currently working on another type of revolutionary data store. Using parallel processing and column-oriented key/value stores for process serving software and having it munge itself in to XML to

communicate with our user interfaces will revolutionize things in our industry, especially for very large agencies with multiple branch offices. We've tested this technology with millions of records and it is breathtaking. In the next year or so we hope to bring it to the industry. This kind of innovation and research is also something that separates LoyalDog from other process serving programs.

6. What else should the potential user know about your product?

CM – The management at CivilMap believes in constantly utilizing the most up to date technology that is available to our industry. We believe that supporting and strengthening the group of people who are entrusted with maintaining control and oversight for the practice of our occupation is of the utmost importance. With this said, CivilMap will pay its customers initial membership into the National Association of Professional Process Servers, and will also be paying for customers' membership cost into their state associations.

GT – Global Tracker is your total business solution providing complete automated web-based tracking for your legal needs. We are ready to do a Webinar with you to show you all of the features of Global Tracker and how it can meet and exceed your expectations.

TS – TrueServe is not just for anyone. TrueServe is a living, breathing, thinking program with the best support anywhere and hundreds of users who can help you get the job done more efficiently than your competition ever dreamed of. If you want to grow your company and join a group of business professionals with the same goals in mind then TrueServe is for you. Our community will get together for monthly webinars to discuss the program and the industry, as well as have access to proven marketing materials and expert advice from a company with a proven track record for success. We are not just selling software, we are teaching our users a new way to do business. With TrueServe you will blow your competition away.

LD – There are 8 people in this company working side by side and nobody can copy our persistence, dedication and commitment. All of us deliver a piece of ourselves to you along with our service and our product. Our job is to give our customers a tool so powerful that it allows them to dominate their markets. We're very proud of our product and the difference that it makes in people's lives. We know that we're in the customer service business and need to keep our ears to ground to stay the best at what we do. It is often our customers who come up with neat and creative ways in which work can flow faster, and we make it our business to listen to them. Don't settle for anything less. 🐾

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HANDLING YOUR ACCOUNTS RECEIVABLE

by Steve Janney

2009-2010 CALSPro President

We have all looked at an accounts receivable aging report and wondered how that big number got in the 90+ day category. What could I have done differently? Why is so much of my time dedicated to collections? As owners and managers of legal support companies, we know the job isn't complete when the document is served. It is complete when the paycheck clears!

I have come to believe that the efficient collection of accounts receivable is divided into 3 phases – policies in effect **before** I receive the assignment; my work **during** the completion of the assignment; and my communication with my client **after** the assignment is completed.

BEFORE

The before phase is the phase that is most neglected. These are your policies regarding how the assignment will be handled. I have been taught that "perception trumps reality ... always." If you let your client define your policies, they will always define them to their advantage. Make sure your client understands the following.

1. What are you agreeing to do? Always get written instructions. And if asked for a quote be sure to include all possible scenarios. What if the given address is bad? Will you automatically try to locate? What

about a 2nd serve at the same address? Do you limit the number of attempts? Some states require a notary and some a declaration of due diligence. Do you charge for those services? You want to avoid the "I thought it was included" phone calls.

2. Who pays the bill? While this may seem to have a simple answer, many clients may just forward the bill to their client or insurance company for payment. 60 days down the line, you do not want to hear "I sent that out for payment and I am not responsible."

3. When is the bill due and payable? Make sure your payment policies are clear. And if you offer a discount, make sure that discount is communicated. "30 days Net" or "2% 15 days" should be clearly visible on the invoice or statement.

DURING

Good notes and records should be kept during the completion of the assignment. I have a saying "If it's not written down, it didn't happen." Each attempt should be documented. Date, time, cars in driveway, color of house are important pieces of information. How did you verify the address? Did you speak with any neighbors?

When the document is served, make sure you have a description of the individual

and any specific circumstances leading up to or during the service. Good notes and records will give your client confidence in you and your work product.

Keep notations as to communication with your client. Date, time and who you spoke with keep the communication trail clear. I really hate to leave voice mail, but sometimes you have no other choice. E-mail is also an effective communication tool.

Make sure you get approval for any additional charges incurred during the completion of the assignment. Again, names, dates and times are important.

AFTER

Prompt presentation of an invoice and proof of service is the first part of the after phase. It is counterproductive to make the client call and ask for a proof. Set a company policy regarding the time frame of returning the completed assignment.

I recently flew Alaska Airlines and they have a "20 minutes or \$20.00" policy regarding the customer's luggage. If the customer's luggage is not ready for them to pick up within 20 minutes, the customer gets a \$20.00 coupon for their next flight. I was pretty impressed when I had my luggage within 18 minutes. And on my next flight

Continued on page 8

with Alaska, I won't be worrying that I might have to wait for my luggage. They have built some trust with me as a customer.

Close your books monthly and present a statement. Many clients will wait for a statement, balance their invoices to that statement and then pay the statement in full. Statements are also a good way for a client to know when a specific invoice has not been paid or is past due.

When handling your accounts receivable, remember the phone is your friend. And the quicker the phone call, the better. Invoices get misplaced and a phone call will often get it scheduled for payment. A quick phone call allows you to begin friendly before moving to adversarial. It is easier to be friendly at 15 days than 90 days past due.

And finally try to limit your exposure to loss in your accounts receivable. A big client who doesn't pay you is a bad client! Have a policy for limiting or suspending service and stick with it. Perhaps at 45 days past due you no longer advance funds and at 90 days past due you no longer accept new work. But regardless of your policy, if it is not enforced it will be ignored.

While there is no "sure fire" collection program, I have found the implementation of these 3 phases makes the collection of your accounts receivable a little less painful and a lot more successful. ☺

Furthermore, it is also a misdemeanor for a person (process server or process serving company) to induce (solicit, coerce, or influence) a notary to execute a false certificate or other writing.

All electronic signatures must be personally affixed, applied or signed to the proof of service or other documents by the actual server that made the service and only after they have approved of the manner and facts of the service in the proof of service or declaration. Electronic signatures must be only used in courts where law or court rules allow them.

I encourage all CALSPro owners and managers to implement business practices that conform to our Code of Ethics. Do not place your company, your client or our profession in harm's way by ignoring our Code of Ethics.

I encourage all individual servers to protect your signature. It is as important as the date, time and person served on your proof of service,

There is a proverb that states "A good name is more important than silver or gold." Our reputations, both as individuals and collectively, may be lost in a minute and take years to recover. I challenge us all to do what is right and not just what is easy as we fulfill the essential part we play in the application of due process in our legal system. ☺

Just give it to

Michael and his team of experienced law clerks and process servers are at your service anywhere, anytime in **Canada** and the **U.S.A.**

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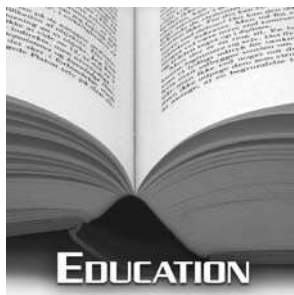
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CONTINUING EDUCATION REPORT

by **Cliff Jacobs**

2009-2010 Continuing Education Committee Chairman

It has been a very busy year once again for Continuing Education. We were given a new challenge at the very beginning of the year to provide twice the results we accomplished last year. The committee, as a team, has accepted that challenge head on. The team's leadership consisting of Jeremiah Jones, Chad Barger and myself re-committed to bring even more to the table this year than last. We hit the ground running hard in January with a major materials review and makeover, and have not slowed down yet. CCPS Workshops and Exams have been held in Riverside, Fresno, Sacramento, and Ventura; with San Diego, Oakland and Palm Springs (exam only) still to come. We also had approximately 70 people attend the Friday Night Insight in Los Angeles, featuring the Presiding Judge of the Largest Trial Court in the United States (Los Angeles) as our guest speaker.

The CCPS Workshop and Exam undergoes an annual makeover in January; and is also continually being revised, updated and improved throughout the year. We feel that CALSPro provides the highest quality Process Server program available, and we are committed to expanding our offerings in the future. Next year, the plan is for Jeremiah Jones to take on more responsibility as the Chairman of the committee; but the committee needs additional strong leadership to keep the momentum going strong. I, along with Chad will provide oversight and guidance; but we are looking for the next couple of people wanting to get involved with CALSPro as leaders on the Continuing Education Committee. If you have an interest in becoming actively involved in CALSPro and or the C. E. Committee and making a difference, please contact me and I will show you just how you can make that difference and get involved. We will provide the inroads and experience to bring forth that leader inside of you.

Although the workshops have been successfully delivered in both Northern and Southern CA thus far this year one thing a bit odd is that as we are reaching out to new areas in response to feedback that "we never go there", instead of an overwhelming response, we find out after the event that many people just haven't opened their e-mail timely, or forgot to clear the date. The C. E. Team works very hard to bring these events to you. Plan to **attend**, help **sponsor** the event, or **both**. Our programs are unique, educational and valuable to you and your success as a Legal Support Professional. Please make it your concern to attend and support our programs when they are in your area. Spread the word too. Believe it or not it helps.

I would like to point out the following individuals who have gone over and above the call of duty in support of the Continuing Education program: Chad Barger, Jeremiah Jones, Wendy Bowman, Andy Estin, Gary Hansen, Steven Janney, Tony Klein, Mark Manchester, Mark Schwartz, and Pat Woodman. The evolution and success of CALSPro Continuing Education over the past 3 years can be directly attributed to the commitment of these individuals.



CALSPro COMMITTEES

Hoping to tap into somebody else's expertise? Join a CALSPro Committee. The current chairs of the CALSPro Committees are as follows:

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Michael Kern – Chairman
213/483-4900
mkern@kernlegal.com

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Jack Biggerstaff – Chairman
213/628-6338
jackb@janneyandjanney.com

ASSAULT ADVISOR

Mark Schwartz
(415) 491-0606
mschwartz@onelegal.com

BYLAWS

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

CONFERENCE

(2010, Palm Springs)
Stephanie Saylor – Vice-Chair
831/384-4030
info@saylorlegal.com

EDUCATION

Cliff Jacobs – Chairman
213/627-1212
cjacobs@onelegal.com

FORMS

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

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brettp@janneyandjanney.com

MEMBERSHIP

Larry Kirlin – Chairman
559/233-1475
l.kirlin@attorneysdiversified.com

NEWSLETTER

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

TECHNOLOGY

Robert DeFilippis – Chairman
800/938-8815
support@onelegal.com



MEMBERSHIP COMMITTEE REPORT

by Lary Kirlin

2009-2010 Membership Committee Chairman

The annual conference is right around the corner. I can hardly believe it's coming up on a year. Last year was the first time I attended a conference and I was extremely pleased with the topics and the venue. It was also a great opportunity to meet people face to face that I had only known through phone conversations and war stories.

From a membership perspective, the conference is one of the best benefits of membership in CALSPRO. It gives us a

unique opportunity to absorb information about our profession that will help us keep our businesses running smoothly. I don't feel like I can go around town and ask my competitors the secrets to their business, but at conference, that's exactly what you will learn.

On another front, the Board has given their support to the creation of a new limited membership category called a "Supporting Member". The new category is kind of a catch all for people who want to join but

aren't otherwise eligible for membership. The new category is still being formulated. I expect more information to be available by the time we are at conference.

In conclusion, I want to thank the new members who have chosen to join our association this year. I am glad to see that each of you has recognized that cost to join is far outweighed by the benefits of membership. Welcome aboard!" 🐾

In Memoriam: Robert A. Cook *~ 1917 – 2010 ~*

CALSPRO lost an esteemed member of our Association June 25, 2010, in the passing of Robert A. Cook. Bob, born in Memphis, TN, served in the United States Air Force during WWII as a flight navigator. He later moved to California where he started Robert A. Cook & Staff, and over a thirty year time span, developed his company into one of the most successful photocopy businesses in the industry. We asked Joe Karotkin for his insight.

Bob was in photocopy when that meant hanging wet copies to dry with clothes pins on lines stretched throughout the office. (A type of Multigraph/Dittograph process) This was a new arena back then, with few players in the game. Bob worked with the technology available at the time, perfected the process, took care of his staff and built a very successful business. He paved the way for many of us and we benefited greatly from his knowledge. If he had a better way of doing something, he shared that information. He was so confident in his company and the service he and his staff provided that he was



never reluctant to share what he knew and educate others in the field.

CAPPS came to a moment in time; photocopiers were in the business of service of process and enabling legislation was in order. The CAPPS Board faced with the probability of another association for the photocopy industry sought to consolidate photocopy and process in its legislative endeavors. Bob was the first person we called that Saturday afternoon. We knew if we were going to make any progress, we had to have Bob on board and he didn't hesitate one second. The

California Association of Professional Process Servers became the California Association of Photocopiers and Process Servers in large part because of Bob's expertise and support he offered the Association. I will always remember him as a gentleman. He used to say, "People who feel good about themselves create great results." He treated people well with the utmost respect and dignity.

Bob loved his Porsches, good food, great shoe leather, fine watches and pinkie rings, but most of all his family, staff and the photocopy business. We were so fortunate to have had him in our lives. I will miss him.

Bob served as the president of CAPPS in 1987 and was awarded the Bert Rosenthal Memorial Award in 1998 for his outstanding and dedicated service to this industry. Bob was survived by his wife, Jacqueline, stepdaughter, Sherry Ritchey, and many other family and friends. In lieu of flowers, the family requests that donations can be made to the Humane Society of Silicon Valley. 🐾

2010 Bert Rosenthal Memorial Award

Each year the Bert Rosenthal Memorial Committee meets and makes nominations for recipients of the Bert Rosenthal Memorial Award. The industry's 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 this 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 the past recipients of the award. Should there be a recipient chosen, the name will be announced at the 42nd CALSPro Conference in Palm Springs, CA. We thank you and congratulate all of the nominees for all you have given to our industry.

On behalf of the committee we are proud to announce the Bert Rosenthal Memorial Award nominees for 2010:

Mike Belote
Jennifer Blevins
Gary Hansen
Steve Janney
Brett Peters

Look for the nominees' full bios in your Conference Workbook, at the conference in October.



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42nd CONFERENCE Protecting Your Business - Professionally, Legislatively and Financially

— October 8-10, 2010 —

HOTEL:

The Hilton Palm Springs Resort will host our conference this year. The Resort is located at 400 East Tahquitz Canyon Way, Palm Springs, CA 92262

The Hilton Palm Springs Resort

400 East Tahquitz Canyon Way, Palm Springs, CA 92262
760.320.6868 • www.palmsprings.hilton.com

Room Rate: \$139.00 for single/double occupancy. Cut-off Date: **Tuesday, September 7, 2010.** Please contact the hotel directly and ask for the CALSPro rate.

REGISTRATION DETAILS:

Please complete the registration form inserted with this brochure. Please use additional sheets if you have more than three attendees from your company.

All registrations must be returned with payment and postmarked by September 24, 2010 to avoid higher registration.

ANNUAL BUSINESS MEETING:

The Annual Business Meeting will be held on Saturday, October 9th from 9:00 am – 10:15 am and from 1:30 pm – 2:30 pm. and ending on Sunday, October 10 with our Legislative Update and Policy/Committee reports. During these sessions, important topics will be discussed, including: a Legislative Update; Committee Reports; Bylaw Amendments; 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.

Turn the page for Schedule and Registration



CALSPRO 42ND CONFERENCE

**CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS**

**Hilton Palm Springs Resort, Palm
Springs, CA – October 8-10, 2010**

CONFERENCE SCHEDULE

FRIDAY, OCTOBER 8, 2010

10:00 am Check-in / 11:00 am Start
14th Annual CALSPRO Jack C. Janney Memorial Golf
Tournament – Tahquitz Creek Golf Resort

Afternoon/Evening
Exhibitor Set Up

6:00 pm – 8:00 pm
Registration Open

7:00 pm – 9:00 pm
Welcome Cocktail Reception

9:00 pm – 12:00 midnight
Poker Tournament

1:30 pm – 2:30 pm
Annual Business Meeting Continued
Elections and Continuation of Committee Reports

2:45 pm – 3:45 pm
CONTINUING EDUCATION SESSION:
• Accounting/Taxes

4:00 pm – 5:00 pm
CONTINUING EDUCATION SESSION:
• Difficult Process Serving Assignments ,
Tony Klein, Attorney Service of San Francisco

6:00 pm – 7:00 pm
Cocktail Reception

7:00 pm – 9:00 pm
Annual Awards and Installation Banquet

SATURDAY, OCTOBER 9, 2010

7:30 am – 4:00 pm
Registration Open

7:30 am – 4:00 pm
Exhibits Open

7:30 am – 9:00 am
Continental Breakfast

8:00 am – 8:45 am
Board of Directors Meeting

8:00 am – 8:45 am
New Member Orientation

9:00 am – 10:15 am
Annual Business Meeting - Financial Report,
Bylaw Amendment Proposals,
Nominations for the Board of
Directors

10:30 am – 12:00 noon
CONTINUING EDUCATION SESSION:
Foreign Deposition & Subpoenas John Perez, NJ Legal
Process Service and Tony Klein,
Attorney Service of San Francisco

12:00 noon – 1:30 pm
Networking Luncheon

SUNDAY, OCTOBER 10, 2010

8:00 am – 9:00 am
CCPS Exam

8:30 am – 12:00 noon
Registration Open

8:30 am – 1:00 pm
Exhibits Open

8:30 am – 9:00 am
Continental Breakfast

9:15 am – 10:30 am
CONTINUATION OF ANNUAL BUSINESS MEETING
Legislative Update
Policy/Committee Reports

10:45 am – 12:00 noon
PREPARING FOR A DISASTER
How do you keep your business open when a
fire hits or some other disaster. Hear first hand
on how you prepare your business for a disaster.
Steve Janney, Janney and Janney Attorney
Service.

12:00 pm
CONFERENCE CONCLUDES

**CALSPRO**CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS**42ND CONFERENCE****Hilton Palm Springs Resort, Palm
Springs, CA - October 8-10, 2010**

Company Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone Number: _____ Fax: _____ E-mail: _____

Attendee Name:

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

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and Associate Members.****Full Registration – Non-member**☐ \$325 ☐ Late Registration \$375***Non Member Guest**☐ All events \$175
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☐ Saturday Lunch Only \$55
☐ Saturday Banquet Only \$65**Education Only**☐ \$150 ☐ Late Registration \$175***Golf Tournament**☐ \$125**(CCPS) Exam**☐ Free (member)
☐ \$20 (non-member)**Poker Tournament**☐ \$40**Total: \$** _____**Attendee Name:**

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☐ \$20 (non-member)**Poker Tournament**☐ \$40**Total: \$** _____**Attendee Name:**

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and Associate Members.****Full Registration – Non-member**☐ \$325 ☐ Late Registration \$375***Non Member Guest**☐ All events \$175
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☐ \$20 (non-member)**Poker Tournament**☐ \$40**Total: \$** _____**SPONSORSHIP:****Sponsors will have their name and company name listed on signs at each event and will be listed in the Conference Program.****\$1,000 – RUBY** ☐

(Various name recognition listings)

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(Various name recognition listings)

\$250 – SILVER ☐

(Various name recognition listings)

Other Amount ☐

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Please feel free to make copies of this form for additional registrations. Mail or fax completed form and payment to:

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