



CALSP^{ro} PRESS

California Association of Legal Support Professionals

Volume 10 / Issue 3 / Conference Issue 2017



LEGISLATION

Legislation:

Highlights of Our History



MEMBERSHIP

Membership:

Member Benefits and Value



EDUCATION

Education:

A Worthwhile Investment



CONFERENCE

Conference:

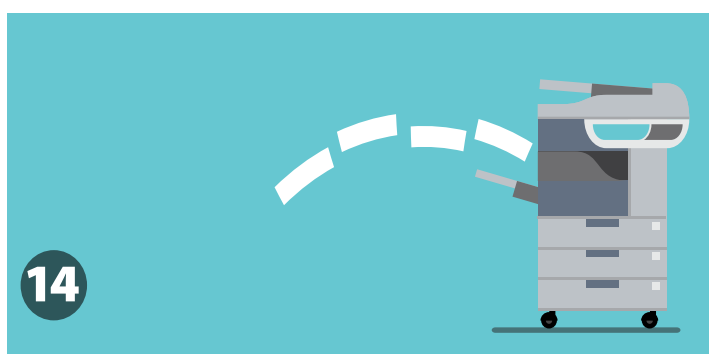
September 22-24, 2017
Omni Rancho Las Palmas
Rancho Mirage, CA





INSIDE THIS ISSUE

- 2 President's Message**
- 3 Strategic Planning Summary**
- 6 Capitol Report**
- 7 Legislative Report**
- 9 Conference Report**
- 10 Conference Brochure**
- 17 Call for Silent Auction Items**
- 18 High Performance Training, Inc.**
- 22 Bert Rosenthal Memorial Award**
- 23 Notice of Bylaw Amendments Proposals**
- 26 Advertising Update**
- 27 Continuing Education Report**
- 28 Photocopy Focus**
- 29 Membership Update**



Thank you to our Advertiser

1-800-Process – 8

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 2017, 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

LARRY KIRLIN

2017 CALSPRO PRESIDENT

STRATEGIC PLANNING SESSION WRAP UP

During the weekend of July 22-23rd, over 30 of our members met in Sacramento for a Strategic Planning Session. The theme for the weekend was "Maintaining CALSPRO's Viability". A full report of the meeting is available in this newsletter. When you have a chance, thank someone on the planning team for volunteering their time and travel expenses to help keep CALSPRO relevant.

Two major Bylaw changes were proposed during the planning session. One has to do with voting for officers and board members electronically before conference. The other has to do with membership categories and dues structure. Both proposals are included in this newsletter. If adopted, these changes will dramatically affect members and the structure of the

association. I strongly urge you to attend conference so you can vote on these important changes.

I strongly urge you to attend conference so you can vote on these important changes.

While we are on the topic of conference... I'm really looking forward to it myself. As soon as I mentioned the word Spa/Resort to my wife, she was in. As soon

as I mentioned lazy river and beach, my daughter was in. I know that Annual Conference is a business meeting for us but it's also a weekend getaway for my family. With that in mind, we booked the conference at a fantastic, affordable location with plenty of family-friendly activities on site or nearby. Please take a look at the materials provided by the conference committee. I hope you and your family will join us this year.





Strategic Planning Summary

California Association of Legal Support Professionals Report of the Strategic Planning Session July 22-23, 2017 Courtyard Marriott Natomas Hotel Sacramento, CA

CALSPro held a strategic planning session for the purpose of examining and discussing the current state of the association, and crafting goals and objectives to maintain the association's viability to best meet the needs of the members.

The association's current business model is no longer sufficient to maintain a balanced budget and we have been operating in the red for some time. Our reserves are nearly gone and cannot sustain another negative year. Membership is down 35% from 10 years ago. Participation in the pouch is down 30% and diminishing due to electronic alternatives. The time to take action is past. The time to take bold and decisive action is now.

Facilitators:

Jennifer Blevins, CMP, Administrator
Andy Estin, Past President and Director
Larry Kirlin, President and Director

Attendees:

Tom Alkema, Director/Chair, Newsletter
Chad Barger, Chairman of the Board/Chair, CICA/Past President
Mary Beaudrow, Past President
Mike Belote, Legislative Advocate/Anti-Trust Officer
Jenny Blevins, Administrator
Tom Bowman, Director/Assault Advisor/Past President
Kendall Carter, Member
Andy Estin, Director/Past President
Andrew Gowing, Director/Chair, Technology

Ken Hastings, Secretary-Treasurer/
Chair, Budget and Investment/Chair, Conference
Mike Hylan, Member
Cliff Jacobs, Immediate Past President/
Chair, Membership
Steve Janney, Chair, Legislative/Past President
Jeff Karotkin, Past President
Michael Kern, Chair, Historical/Chair, Website/Photographer/Past President
Larry Kirlin, President
Tony Klein, Chair, Forms
Mark Manchester, Member
David Nill, Past President
Anita Pasillas, Member
Brett Peters, Past President
Robert Porambo, Vice President/Chair, Advertising/Chair, Anti-Trust
Kristian Pujol, Director/Chair, Continuing Education
Stephanie Schoen, Administrator
Mark Schwartz, Past President
Lauri Taylor, Director/Chair, Bylaws
Sam Virk, Member
Paul Wysong, Member

Introductions

The session started off with a call to order by Larry Kirlin reminding us that our goal is to develop actionable items. Day one is a green light day where the free flow of ideas is encouraged and no subject is taboo. Day two will be used to filter down the ideas. After the call to order, each participant was given time to share their thoughts.

Survey

Two surveys were conducted in June 2017; one going to members and another to

California based NAPPS members who are not members of CALSPro. The full set of anonymous responses are attached to this report.

Summary of Member Survey (<https://tinyurl.com/yar92frl>)

- 47 members responded to the survey
- 62% of our members have been in the profession over 20 years
- 31% identified themselves as independent contractors
- 67% work at companies with under 20 employees
- 96% exchange work with other members
- 98% list process service as a top focus of their business, followed by court filing at 73%
- 25% listed photocopying as a top focus
- 71% perform electronic filings
- 70% consider our legislative program as an important reason for them to be a member of CALSPro
- 91% are very satisfied or fairly satisfied with the association. Only 9% are not satisfied.
- 26% say that Company membership dues are not a good value
- 63% consider the association to be effective with face-to-face networking opportunities
- 61% report that we are effective at creating professional education opportunities

Summary of Non-Member Survey (<https://tinyurl.com/y9tg4pyr>)

Continued on page 4

- 8 people responded to the survey
- 71% were interested in affiliate work opportunities
- 71% were also interested in our CCPS education/certification program

The most common written response to the survey mentioned our need to communicate the value of CALSPro membership and suggested that they would join if given the right reason.

Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis

A SWOT analysis was used to get the group thinking about issues. Strengths and weaknesses are internally focused; Opportunities and Threats are issues that affect the association from the outside. Issues can appear in multiple categories depending on perspective.

Strengths (Internal)

- Education (concept)
- Legislation
- Knowledge and Experience
- Core members.
- Volunteers and reputation.
- Representation in Sacramento
- Networking
- CAMS
- Subject Matter Specific Expertise
- Self-Evaluation
- New Faces/Blood

Weaknesses (Internal)

- Education (implementation)
- Communication
- Legislation (to help put revenue in the pockets) – Affirmative legislation every year and publicize it.
- Photocopy representation.
- Embracing future technology.
- Lack of focus.
- Online presence.
- Conference
- Networking
- Finances – Future
- Lingo – Defined Terms
- Voting Structure
- Attracting Next Generation
- Self-Evaluating
- Follow-Through
- Governance
- How we serve our members.

Opportunities (External)

- Registered E-Service
- Favorable Legislation
- Technology
- Serve Now
- Tyler
- NAPPs
- Millennials
- New Member Opportunities
- Strategic Partnerships
- Identify Other Legal Support Professionals
- Directory sale to the legal community.

Threats (External)

- E-Service of Primary Documents
- Tyler
- NAPPs
- Serve Now
- Apathy – What is CALSPro
- Adverse Legislation

Narrowing Down the Topics

Using the comments from the participants, surveys and SWOT analysis, the group categorized the issues into the following areas of discussion:

- Communication
- Marketing – to Potential Members and the Legal Community
- Revenue
- Benefits
- Membership
- Structure
- Legislation
- How do we adequately fund this association to support its goals?
- What does the association need to remain viable and relevant?

Participants were divided into sub-groups to discuss the top four issues:

Group 1 – Communication/Marketing – Kristian Pujol, Presenter

- Convey to the membership that we want to protect and preserve their business with integrity.
- Communicating often – meeting results, legislative actions.
- Increase membership satisfaction.
- Increase membership of millennials.
- Become a MCLE provider.

- Offer podcasts, webinars, free to see live, but pay for the recording.
- Uber concept – idea of having servers at your disposal.
- CALSPro branding on affidavits. Include CCPS designation on proofs of service.
- CALSPro Mobile App: codes, navigation tools, maps, members
- 50th Conference to be offered in virtual form.

Group 2 – Revenue and Expenses – Sam Virk, Presenter

- Membership Dues – ACH or credit card per month implementation
 - o Monthly \$29.95 dues payment – auto pay = \$360 per year – maybe discount to \$300 if paid all at once.
 - o Associate - \$9.95 per month or \$100 if paid all at once.
 - o Independent Contractor - \$9.95 per month.
 - o Goal to have 250 members – all one category.
 - o \$10,000 - \$15,000 possible shortfall with dues structure change. Need 30-40 new members to break even.
 - o Without making any changes to our current structure our revenue will continue to slide, eventually surpassing the possible shortfall noted above. We believe that the proposed changes will encourage more membership and therefore result in more revenue.
- Would like to examine every single expense line item to see what is really needed.
 - o One face to face board meeting – savings of \$5,200 anticipated
 - o Office Supplies – reduce to \$1,000
 - o Conference printing - don't have conference booklets
 - o Conference banquets – Jenny to get “creative”.
 - o Sponsorships – Fundraisers – Advertisers – may want to look at
 - o Every other year conference.

Continued on page 5

Group 3 – Benefits and Membership – Lauri Taylor, Presenter

- Restructuring the membership.
- Allow Individual members to pay for the pouch if they want.
- To allow Individual members to advertise.
- Individual members get all the same information in the listing, including their company name.
- All members are in the directory in one place – not segregated.
- Marketing plan to bring in the Independent Contractors allowing them a limited membership for one year, perhaps complimentary, maybe require they take the CCPS exam.
- Allow for voting of officers and directors by the entire membership without being at conference – take voting out of conference.
- For Independent Contractor membership:
 - o Private area on the website for members to be able to see the IC members that are available to use, to increase the service of process audience and provide a benefit to the IC.
 - o New Member Buddy System – a board member shall be assigned to a new member as a buddy.
 - o Reach out to the registered process servers to offer a listing in the member's only area at no charge and then introduce them to CALSPro and show the value to them so that they become a member.

Group 4 – Structure – Steve Janney, Presenter

- Election Procedures
 - o Currently restricted to those attending conference only and unrealistic in expectations.
 - o Recommend we allow all members to vote, not just those at the conference.

- o If changed, would allow for more candidates. Self-declare rather than nominate.
- o Implement a time to declare your intent to run for office for all members.
- o Allow for better communications of issues if candidate statements are published to the membership. Would allow for transparency.
- o Create basic for requirements to hold office.
- o Implement a Nominating Committee to oversee rules, candidate statements and procedures. Under the membership committee cornerstone to oversee elections.
- o Announcement at conference as to who has been elected and immediate notification to the members via technology.
- o Bylaw amendment to be developed that is general enough to be voted on this year to be implemented for 2018.
- Other structural items can be changed in the Manual of Policies and Procedures by the President and Board of Directors

Final Recommendations

Although many viable ideas were presented over the weekend, some were selected as having the most merit.

1. Propose Bylaw amendments to change Company member to Active member with all rights and privileges and Individual Member shall be changed to an Independent Contractor category, and that the Bylaws Committee shall be charged with drafting language to support same. (Attached is the working document from the meeting.)
2. Propose Bylaw amendments and procedural changes to allow for voting before the Annual Conference. (Attached is the working document from the meeting.)
3. Improve Marketing/Communications
 - a. Raise awareness of CALSPro and CCPS within the legal community

- b. Ask members to use other members
- c. Legislative updates
- d. Newsletter/eBlasts
- e. Infographics
- f. Webinars, YouTube Videos, Podcasts
4. Reinstitute Area Governor Program-networking, speakers, meetings
5. Establish a Buddy System
6. Market to all RPS. First target our own IC, then get registration data from County Clerks, ServeNow & Process USA.
7. Notify NAPPS members that we are asking our members to utilize CALSPro members first.
8. Create CALSPro Mobile Application
9. Create member-only section on website.
 - a. IC Members would be listed here.
 - b. Forms & resources
 - c. Insurance/special offers for members
 - d. Helpful web links
10. Implement flexible payment options
11. Insurance discounts (E&O)
12. Develop a welcome packet for IC
13. Create member prices for certification, conference, education, etc.

All of the above recommendations and proposed Bylaw amendments were unanimously supported by all attendees and the board of directors. The Bylaw amendments proposed above are attached to this report and will also be distributed to the members separately with arguments pro and con. The President, Board of Directors and relevant committees will work together to implement as many of the recommendations as possible/practical. Some action items were assigned to specific members at the conclusion of the session. Other items require board approval or vote of the members before they can move forward. It is the responsibility of the President to ensure action is taken.



CAPITOL REPORT

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

END OF LEGISLATIVE YEAR APPROACHES

2017 may be just over half complete according to the calendar, but in legislative terms the year is steaming towards conclusion. After the end of the summer recess, senators and assembly members will return on Monday, August 21 for just four remaining weeks of session, adjourning for the fall on September 15. Governor Brown will then have 30 days to sign or veto the 800-1000 bills likely to land on his desk.

This has been a hard year in Sacramento for a variety of reasons. Democrats enjoy a 2/3 supermajority in both houses, but that level of dominance comes with its own set of issues. Specifically in California, we are now seeing Democratic infighting between moderates and progressives, with progressives (i.e. "Berniecrats") pulling to the left, and moderates pushing towards the middle. Difficult 2/3 votes have been achieved on raising the gas tax, and extending California's landmark "cap and trade" program, but clearly a sort of fatigue has set in about further hard 2/3 votes for the remainder of the year.

Amazingly, the right wing of the Republican party wants to recall Assembly Minority Leader Chad Mayes for his actions on cap and trade, while the left wing of the Democratic party may attempt to recall Speaker Anthony Rendon for slowing down the \$400 billion single-payer health care bill!

And to think, the California Legislature is considered more collaborative than Congress!

In terms of how this might affect CALSPro issues, fearless prognostication would suggest that a 2/3 vote on imposing a \$75 surcharge on recording real estate documents is possible but will be hard, while a 2/3 vote to rewrite the sales tax law to cover services is out of the question this year.

While the vast majority of all bills which reach the governor's desk do so right at the end of the legislative year, bills actually go to the governor throughout the year. One example is CALSPro-sponsored AB 1093 (Chen). This bill amends Code of Civil Procedure Section 415.20 to clarify that if the only address reasonably available to a process server is a private mail box (known as a "commercial mail receiving agency" under California's Business and Professions Code) service on the CMRA may be accomplished on the first attempt. This simply eliminates any suggestion that the server must go to the CMRA multiple times in the (likely) vain hope that the party to be served just happens to be present. AB 1093 becomes effective on January 1, 2018.

Of the remaining nearly 30 bills in the CALSPro legislative folder, it is fair to say that there are no "stop the presses" bills, relating to personal service or other core functions of the members. CALSPro and the Coalition for Improving Court Access

(CICA) were heavily involved in AB 976 (Berman) which relates to e-service of notices, typically on opposing counsel. The Judicial Council is the sponsor of the measure, which is intended as a technical bill cleaning up various civil and criminal statutes relating to service of notices. Under the law, these notices, which are sometimes referred to as "secondary notice", may presently be served by first-class mail. CALSPro and CICA continue to work with the Judicial Council to make sure that the changes in the law work from an administrative standpoint.

Although not all bills enacted this year will be signed or vetoed by the time of CALSPro's 49th Annual Conference in late September, we should have a much better idea of how the year turned out in Sacramento. Plan on attending the conference as the discussion of politics in Sacramento is never boring!



CALSPRO Legislative Update

By Steve Janney, Legislative Chair

It has been a interesting year in the California Legislature. In the beginning of the year an agenda was discussed and decided upon. When deciding on a legislative agenda, several guidelines are considered. Both long term and short term goals and projects are discussed. Often the long term projects can run over several years with legislative setbacks part of the project.

An example of a long term project still being pursued is the legislation a few years back to move our registration from the individual county clerks to the State Bar. All seemed to be moving smoothly until an unexpected roadblock appeared. But every year we continue to evaluate this project and wait for an opportune time to reintroduce this legislation.

This year our legislative agenda was more short term, focusing on a specific aspect of the service of process. For the last few years we have discussed the requirement for diligence to be established before substituted service on an individual can be affected at a Commercial Mail Receiving Agency (CMRA). It seemed rather inefficient to have to establish diligence when there was no way to

determine when the defendant might possibly be present to receive mail

The proactive CALSPRO legislative was introduced this year as AB 1093. Its summary read as follows:

Under existing law, if a copy of a summons and complaint cannot with reasonable diligence be personally delivered to the person to be served, as specified, a summons and complaint may be served by leaving a copy with certain people at the person's dwelling house, usual place of abode, usual place of business, or usual mailing address, other than a United States Postal Service box, and mailing a copy of the summons and complaint by first-class mail to the place where a copy was left. This bill would, if the only address reasonably known for the person to be served is a private mailbox obtained through a commercial mail receiving agency, allow service of process to be effected on the first delivery attempt by leaving a copy of the summons and complaint with the commercial mail receiving agency, as specified.

This bill was signed by the Governor on July 24, 2017. Effective January 01, 2018 substituted service may be affected on an

individual defendant on the first attempt at a CMRA if this is the only address known. While not a huge bill, it does make it less costly for our members to serve at a CMRA.

We continue to watch AB 976, a bill introduced by the Judicial Council dealing with electronic filing and service of documents. The bill is currently scheduled for its third reading and is being followed carefully.

The CALSPRO Legislative agenda will continue to be discussed at our conference this year, being held in Palm Springs, September 22-24. It is my hope that all will attend and that issues will be discussed that impact the important part that we play in the judicial process. Get it on your calendar and will see you then.

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***



CALSPRO Conference Update

By Ken Hastings, Conference Chair

High Performance for High Success

It is that time of year again. It is time for conference and I think we have a great one in store for you and your families. CALSPRO is excited to offer a conference where you can not only meet with colleagues but learn something new that you can take home with you and implement in your businesses. We are equally excited about the venue that encourages you to bring your families and enjoy time away from the office.

Each year the Conference Chair works diligently to try and deliver a unique opportunity to interact with industry leaders as well as experts from different fields. This year we are fortunate that we will be delivering both to you. The highlight of this year will definitely be Mr. Bob Davies. Bob brings an interactive program that is sure to entertain as well as inform. Bob speaks all across the country and has graciously agreed to come and speak to us.

Coming out of the Strategic Planning Session we have several new By-Law amendment proposals that are being brought before the membership. Your vote only counts if you are there, so make sure your voice is heard.

Continuing to deliver a new and unique conference venue is not always easy. This year, our location definitely aides in this endeavor by providing a unique location with history. The Omni Rancho Las Palmas is a great resort. Several of our members have stayed at this resort over the past couple of years and find it wonderful.

The Omni Rancho Las Palmas Resort was once the playground of the Hollywood rich and famous. The Hollywood elite would fly their private planes in from greater Los Angeles and land right on the fairways of the resort to escape the city for secret getaways. We hope to provide you with the same opportunities. From the Blu Ember Restaurant to the gorgeous views, from the awesome golf course to the outstanding pools, water slides and lazy river. Yes I said water slides and lazy river.

The resort is adjacent to The River Mall. The mall is an outdoor shopping place which features shops and restaurants such as Fleming's Steakhouse, Yard House and the Cheesecake Factory. There is a movie theater, outdoor live music and a man made river flowing throughout the mall.

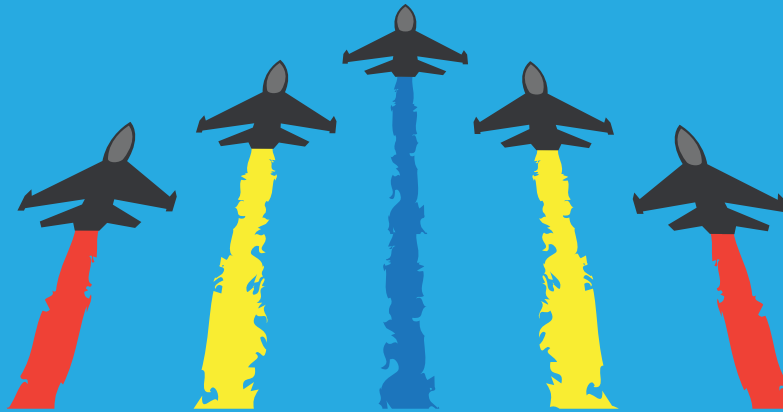
Our location is an 8 minute drive to The Shops at El Paseo. If you have never been to the Palm Springs area before, El Paseo is the Rodeo Drive of the desert. It features shops such as Tiffany & Co., Louis Vuitton, Saks Fifth Ave., Kate Spade New York, Burberry, Ralph Lauren, Lululemon and several respected art galleries. Definitely a great place to shop.

These are just a few of the highlights, sights and options available to you at this years conference. We are working on even more but you will have to attend to see what is in store. So pack up the family, pack your bags, and get ready for an awesome weekend you won't want to miss. All of the conference details follow this report. See you in Rancho Mirage!



49TH ANNUAL CONFERENCE

SEPTEMBER 22-24, 2017 • OMNI RANCHO LAS PALMAS



**HIGH PERFORMANCE
FOR
HIGH SUCCESS**





Omni Rancho Las Palmas

41000 Bob Hope Drive, Rancho Mirage, CA 92270
(760) 862-4533

Hotel Details

Room Rate: \$169/night

Plus a daily resort fee of \$8.00. (Reduced from \$32.00.) Resort fee currently includes toll-free, credit card and local calling, entrance to our fitness center, in-room high-speed Internet access, in-room coffee and tea, overnight self-parking, access to Splashtopia for registered resort guests and daily newspaper available at Front Desk. **Please book by Monday, August 21, 2017.** Please contact the hotel directly 1-888-444-OMNI and ask for the CALSPRO rate.

Conference Details

All registrations must be returned with payment and postmarked by September 8, 2017 to avoid higher registration fees.



Cancellation Policy

Cancellations must be made in writing and received by September 8, 2017. Cancellations will be subject to a fee of \$50⁰⁰ per person. No refunds will be allowed for cancellations received after September 8th.

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, September 23 from 8:00 am – 9:30 am and from 1:30 pm – 2:15 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; proposed bylaw amendments; 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.

21ST ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Friday, September 22, 2017

7:30 am Check-In

8:00 am Tee-Off

**Omni Rancho Las
Palmas Golf Course**

41000 Bob Hope Drive
Rancho Mirage, CA 92270
(760) 568-2727

Transportation on own

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

Registration cutoff September 8th.

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 workshop & exam
on Sunday, September 24th.
Free with conference registration but
pre-registration is required.**



21ST ANNUAL **JACK C. JANNEY** MEMORIAL GOLF TOURNAMENT

WHEN: FRIDAY, September 22, 2017

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

WHERE: Omni Rancho Las Palmas Golf Course
41000 Bob Hope Drive, Rancho Mirage (760) 568-2727

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 8, 2017 at noon. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in some conference materials. [Company logos should be e-mailed to: stephanie@camgmt.com](mailto:stephanie@camgmt.com). Checks made payable to CALSPRO at 2520 Venture Oaks Way, Suite 150 Sacramento, CA 95833 or you may fill out the credit card form below and fax it to: 916.924.7323. Please do not email.

Name of Card Holder _____

Company Name on Card _____

Billing Address _____

City _____ State _____ ZIP _____

Credit Card # _____ Exp. Date _____ CID # _____

Amount to be charged \$ _____

Signature of Card Holder _____

SPONSORSHIP OPPORTUNITIES CHECK ONE!

☐ HOLE IN ONE

\$250.00 Sponsorship

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

☐ DOUBLE EAGLE

\$150.00 Sponsorship

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

☐ TEE HOLE

\$75.00 Sponsorship

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

Conference Schedule

FRIDAY, SEPTEMBER 22, 2017

8:00 AM

20TH ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Omni Rancho Las Palmas, Rancho Mirage, CA.

5:30 PM – 7:00 PM

BOARD OF DIRECTORS MEETING

5:30 PM – 7:30 PM

REGISTRATION OPEN/EXHIBITOR SET UP

7:00 PM – 9:00 PM

WELCOME RECEPTION

Music by Simon Alcantara.

Sponsored by:



This year's Friday Night Welcome Event features great food and drinks. The Welcome Reception event will be held on-site on the Sunrise Terrace and should be a fantastic time for everyone to meet new contacts and enjoy a great evening. This location has great views so don't miss out.

SATURDAY, SEPTEMBER 23, 2017

7:00 AM – 8:00 AM

CONTINENTAL BREAKFAST

7:00 AM – 5:00 PM

REGISTRATION AND EXHIBITS OPEN

8:00 AM – 9:30 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 for the Board of Directors and officers. 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.

9:30 AM – 10:30 AM

EXHIBITOR BREAK AND EXHIBITOR PRESENTATIONS

Make appointments with vendors during these breaks for more in depth review of goods and services.

10:30 AM – 12:30 PM

CONTINUING EDUCATION SESSION NUMBER 1 - BOB DAVIES

12:30 PM – 1:30 PM

NETWORKING LUNCHEON BUFFET (BERT ROSENTHAL MEMORIAL AWARD PRESENTATION AND GUEST SPEAKER)

1:30 PM – 2:15 PM

ANNUAL BUSINESS MEETING CONTINUED

Nominations and elections for the Board of Directors and Officers. Proposed Bylaw amendments.

2:15 PM – 2:30 PM

EXHIBITOR BREAK

2:30 PM – 3:30 PM

CONTINUING EDUCATION SESSION NUMBER 2 – STAND YOUR GROUND LAW – BOB MUSSER (OPTION 1)

2:30 PM – 4:00 PM

CONTINUING EDUCATION SESSION NUMBER 3 – PHOTOCOPY ROUND TABLE – 2018 LEGISLATIVE AGENDA (OPTION 2)

3:30 PM – 4:00 PM

CONTINUING EDUCATION SESSION NUMBER 4 – FOREIGN DEPOSITION SUBPOENAS – JOHN PEREZ

4:00 PM – 4:30 PM

EXHIBITOR BREAK

4:30 PM – 5:00 PM

CONTINUING EDUCATION SESSION NUMBER 5 – NAPPS UPDATE – MIKE KERN

5:00 PM – 6:30 PM

VENDOR MEET AND GREET

6:30 PM – 7:30 PM

COCKTAIL RECEPTION

7:30 PM – 9:30 PM

BERT ROSENTHAL MEMORIAL AWARD PRESENTATION, ANNUAL AWARDS, INSTALLATION

Banquet and Silent Auction

SUNDAY, SEPTEMBER 24, 2017

8:00 AM

REGISTRATION

8:00 AM – 9:00 AM

CONTINENTAL BREAKFAST

9:00 AM – 1:00 PM

CCPS WORKSHOP AND EXAM

ABOUT THE KEYNOTE SPEAKER

Bob Davies delivers with a standing ovation. Bob's humorous style of delivery and value of his message is what makes him one of the leading keynote speakers. His ability to provide an affirmative message while making his audience laugh earned him a spot as one of the top 100 Greatest Minds of Personal Development by *Excellence Magazine*.

His message is clear and the outcomes are limitless. With Bob's unique methods, individuals can make small changes that yield enormous outcomes; after all, the difference between 211° and 212° is the difference between standing water and boiling water. Bob's techniques teach people how to take advantage of core actionable steps to yield massive results. By engaging the audience with humor, the techniques are absorbed easily and provide a common sense approach to implementation. His message of turning avoidance into execution leaves his audiences with a lasting sense of empowerment that drives them to reap a lifetime of results.

High Performance for High Success

49th 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 8, 2017. 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 fax it to: 916.924.7323. **Please do not email.**

Name of Card Holder _____

Company Name on Card _____

Billing Address _____

City _____ State _____ ZIP _____

Credit Card # _____ Exp. Date _____

CID # _____ Amount to be charged \$ _____

Signature of Card Holder _____

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

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

• Support Your Industry! • Meet New People! • Have Fun! • See You in Rancho Mirage! •

High Performance for High Success

49th Conference September 22-24, 2017 Rancho Mirage, 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

☐ \$300 ☐ Late Registration \$350*

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

Full Registration – Non-member

☐ \$400 ☐ Late Registration \$450*

Non Member Guest

- ☐ All events \$245
- ☐ Friday Evening Only \$60
- ☐ Saturday Lunch Only \$65
- ☐ Saturday Banquet Only \$120

Golf Tournament

☐ \$125

(CCPS) Workshop

☐ \$0

*No charge for workshop, but pre-registration is required.

Total: \$ _____

Attendee Name:

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

Full Registration – Member

☐ \$300 ☐ Late Registration \$350*

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

Full Registration – Non-member

☐ \$400 ☐ Late Registration \$450*

Non Member Guest

- ☐ All events \$245
- ☐ Friday Evening Only \$60
- ☐ Saturday Lunch Only \$65
- ☐ Saturday Banquet Only \$120

Golf Tournament

☐ \$125

(CCPS) Workshop

☐ \$0

*No charge for workshop, but pre-registration is required.

Total: \$ _____

Attendee Name:

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

Full Registration – Member

☐ \$300 ☐ Late Registration \$350*

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

Full Registration – Non-member

☐ \$400 ☐ Late Registration \$450*

Non Member Guest

- ☐ All events \$245
- ☐ Friday Evening Only \$60
- ☐ Saturday Lunch Only \$65
- ☐ Saturday Banquet Only \$120

Golf Tournament

☐ \$125

(CCPS) Workshop

☐ \$0

*No charge for workshop, but pre-registration is required.

Total: \$ _____

* Registration must be postmarked by September 8th 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



Call for Silent Auction Items

To Whom It May Concern:

The members of CALSPro hope you will take a few moments to read about our upcoming event and decide to participate by donating to our silent auction.

On September 22-24, 2017 we will be hosting our 49th Annual Conference and Silent Auction at the Omni Rancho Las Palmas, Rancho Mirage, CA. We anticipate approximately 100 members and their families at this function and the funds raised will go to CALSPro in their ongoing effort to promote and protect the legal support industry. To make this event exciting and successful we need your help!

Please consider supporting our event by donating gift certificates, merchandise or services to the Silent Auction. In exchange you will receive excellent community exposure and recognition. Your company name and marketing materials will be displayed at the event in addition to being announced at the end of the auction.

Donated items must be received before September 15th to allow time for them to be cataloged and shipped to the conference location. Please contact me directly to discuss shipping arrangements. For any other questions, please contact me at lkirlin@firstlegal.com or Stephanie Saylor at stephanie@saylorlegal.com.

Thank you in advance for considering our request and for supporting CALSPro.

Larry Kirlin

President

A Word from Our Keynote Speaker...

High Performance Training, Inc.
Bob Davies, B.S. Health, M.Ed. Psychology, MCC Master Certified Coach

The Coaching Conversation By Bob Davies



I recently participated on a panel as one of four the top coaches in the USA. It was quite an honor to be selected and it was interesting to see the approaches of other coaches considered to be leaders in the field.

It became very apparent that I have a different and unique approach. I thought I'd share it with you. My approach is a combination of the best practices of elite performers and laws of science.

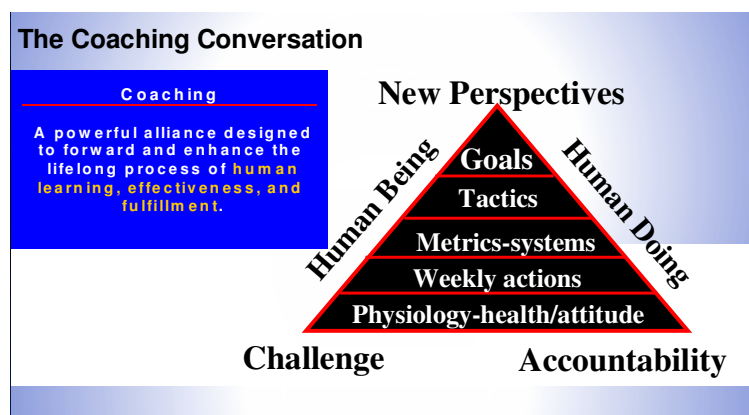
If you look at a definition of coaching you will see that it's a partnership designed to forward and enhance the life long process of human learning, effectiveness and fulfillment. This operates from the major assumption that people want to live in excellence and continue to learn and become for effective and fulfilled.

I've rarely come across someone who doesn't say that they want this but most people don't believe that they can have change and improvement so they simply don't try. They live their lives in resignation believing that they are doing the best that they can be doing.

I challenge people about this. I ask, "Do dogs love bones?" almost everyone will say yes. I reply, "No they don't. They love meat, they settle for bones!" Where are you living your life in resignation believing that you are doing the best that you can be doing.

This type of analysis is not good or bad, it just is. So I'll ask you to look inward without judgment. If you go to judgment you will become defensive and justify your circumstances. This will prevent personal and professional growth.

As a result of the coaching conversation that I have with people they will have the following experience. I use this triangle as an analogy.



They will see things differently then they have on their own in the past, **new perspectives**. They will be **challenged** and they will be held **accountable**. My approach also cares about how they are as a **human being**, how fulfilled they are, their mission, their fun and passions. Also included is their actions. Are they doing not only the right kinds of activities but enough of them for a result to occur. That's **human doing**.

I start at the bottom of the triangle, **physiology**. This is the foundation. Almost everyone that I work with is on my health program. Some are not. I have a coaching commandment that states the following; "Your lifestyle is an asset, not a liability". This is backed up by another commandment, "What I can control, I must control". I also embrace the serenity prayer and add that as a coaching commandment as well, "God grant me the serenity to accept the things that I can not change, the courage to change the things I can and the wisdom to know the difference." We go for progress, not perfection.

Also a major part of this foundational base of my coaching triangle is attitude. All behavior is driven by neurons, your brain. Attitude is mind set. It's a set of beliefs and neurological networks call schemata's. These are wired together bundles of neurons that make up a habit. We must control our attitude.

Science says there is no dispute about this. Your thinking is an electrical impulse that generates the release of chemicals. These chemicals (neurotransmitters) have a charge and like attracts like so it is your thought that creates your reality. I like what the noted biologist Benjamin Libet says, "Reality is in the mind of the observer". This is a quantum physics discussion for another time.

Have you seen the mathematical "Coincidence or Not?" formulas? It states the following;

If

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Equals

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26

Then

K + N + O + W + L + E + D + G + E

11 + 14 + 15 + 23 + 12 + 5 + 4 + 7 + 5 = 96%

H + A + R + D + W + O + R + K

8 + 1 + 18 + 4 + 23 + 15 + 18 + 11 = 98%

Both are important but fall just short of 100%

However

A + T + T + I + T + U + D + E

1 + 20 + 20 + 9 + 20 + 21 + 4 + 5 = 100%

Is this a coincidence? Well the world is made of math. Language is the math of communication. There are no mistakes in the universe, who knows. It's a very interesting observation that is supported by science. For example, a positive attitude works in opposition to the emotional amygdale in the limbic system, the emotional area of the brain, by keeping electrical activity in an area called the septum. With positive thinking the septum is activated and that opens receptor sites for brain chemicals associated with focus, attention and well being. There is a scientific reason to be training your attitude.

Physiology, attitude, mind set, beliefs are ongoing processes of discovery, trial and error, failures and successes and are constantly being developed in my coaching.

Next I jump up to the top of the triangle, Goals. We must ask and answer these questions;

1. What do you want?
2. What are you building?
3. Why bother?
4. How much is enough?

This includes your mission, your vision, why you exist, what your philosophies are as well as the specific targets.

Next will come a discussion on the tactics that you will use to reach those goals. This includes staffing, campaigns, marketing, etc.

This is followed by a discussion about your metrics, what you can observe and measure as well as the systems that need to be in place to execute your plan.

Next the following questions are asked;

1. What do you need to do to have what you want?
2. What do you need to do this week?

3. What will you do this week, your commitment?
4. How will you be held accountable? What is your behavioral contract!

This is a powerful conversation to have. Remember, change is very, very difficult. The reason is due to how the brain works creating neural networks of bundled neurons that wire together and fire together. They become dense and fire fast.

I have mentioned in previous articles how change goes through three stages;

1. Unbearable.
2. Uncomfortable.
3. Unstoppable.

Most people won't make it through the unbearable stage. It takes a reason to persist. You've got to have a clearly defined WHY! If you do persist however, you will generate new neurological patterns, called brain plasticity, and then move to being unstoppable.

It's a matter of purpose, passion, excitement, planning and accountability. I have my clients follow the following steps of their program;

1. Constant learning fosters neural genesis, new brain cell development. So, they read one page a day from my "Day Book".
2. Meditate 5-10 minutes every day. Meditation strengthens the development of the outer cortex, it enhances the mylenation of the neurons for faster and easier firing and increases meta cognition, a noticing of your feelings and sensations.
3. Precise previous planning prevents poor performance. We do weekly behavioral contracts and embrace accountability.
4. Hire a coach!

That's my menu for excellence. Make it a great day!

High Performance Training, Inc.
Bob Davies, M.Ed. Psychology, B.S. Health, MCC Master Certified Coach
20992 Ashley Lane, Lake Forest, CA 92630-5865
949-830-9192 fax 949-830-9492 Email: Info@bobdavies.com Website:
www.Bobdavies.com On-Line coaching www.bobdaviescoaching.com

Named in the Top 100 Minds of Personal and Professional Development, World-wide by Excellence Magazine.

=====
Permission granted to publish this article with Resource information included: Bob Davies High Performance Training, Inc. 949-830-9192 info@bobdavies.com www.bobdavies.com Permission also granted to edit this article.

California Association of Legal Support Professionals

Bert Rosenthal Memorial Award

By Mike Belote
Committee Chairman



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 September.

The Nominees for 2017 Are:

Chad Barger
Mary Beaudrow
Wendy Bowman
Cliff Jacobs

Past Rosenthal Recipients

| | |
|--|--------------------------------------|
| 1978 Bert Rosenthal (In Memoriam) | 1998 Robert A. Cook |
| 1979 Michael Buter | 1999 Jeffery H. Karotkin |
| 1980 Andrew R. Estin | 2000 Edward R. Wasserman |
| 1981 Richard J. Green | 2001 Robert D. Alkema |
| 1982 Not Awarded | 2002 Al Crowe |
| 1983 Carl Strang | 2003 David S. Nill |
| 1984 Hugh Hallenberg | 2004 Mark L. Schwartz |
| 1985 Connie R. Melvin | 2005 Ronald Ezell |
| 1986 Jaunita Tanzer | 2006 Paul Tamaroff |
| 1987 Not Awarded | 2007 Jerry Topolos |
| 1988 Not Awarded | 2008 Jack Janney (posthumous) |
| 1989 Elaine J. Erdman | 2009 Herbert E. Hoffman |
| 1990 Thomas J. Bowman, Jr. | 2010 Not Awarded |
| 1991 Michael O. Price | 2011 Steven Janney |
| 1992 Joseph H. Karotkin | 2012 Mike Belote |
| 1993 Not Awarded | 2013 Brett Peters |
| 1994 Frederic A. Blum | 2014 John Perez |
| 1995 Tony Klein | 2015 Jennifer Blevins |
| 1996 Not Awarded | 2016 Michael Kern |
| 1997 Paul R. Anderson | |

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

August 14, 2017

In accordance with the California Association of Legal Support Professional's Bylaws, Article VII – Meetings, Section 9, notice is hereby given of the Annual Meeting of the membership which shall take place on **Saturday, September 23, 2017** from 8:00 a.m. – 10:00 a.m. and from 1:30 p.m. – 2:15 p.m. at the Omni Rancho Las Palmas Hotel, 41000 Bob Hope Drive, Rancho Mirage, CA 92270. The meeting will be held in conjunction with the 49th Conference. For further conference details, please visit the CALSPRO website at <http://calspro.org/events/annual-conference/>.

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

California Association of Legal Support Professionals Proposed Bylaw Amendments
For Presentation to the Members on September 23, 2017:

~~Strikethrough~~ denotes deletions and *italicize with underline* denotes insertions. All proposed amendments are also **highlighted**.

PROPOSAL #1 of 2:

ARTICLE VIII - ELECTIONS

Section 1. The Directors and Officers shall be elected by a secret **written** ballot **at the Annual Meeting**.

Section 2. No person shall be eligible for election as an Officer or to the Board of Directors unless he/she has been a member in good standing for one (1) year or was admitted at the last annual conference. All eligible members ***may declare their candidacy to the Nominating Committee*** ~~must be nominated by a member in good standing and seconded by one or more such members at the Annual Meeting.~~ ***In order to be eligible to run for the office of President, one must have been a member in good standing for a minimum of three consecutive years and have served a minimum of two years as an Officer or as a member of the Board of Directors.***

Section 3. No vote either by representation or by proxy shall be allowed.

~~**Section 4.** Any member nominating an absentee for any office or seat on the Board of Directors shall present a letter from the candidate stating his willingness to serve if elected.~~

Section 54. Election to all seats to the Board of Directors shall be filled in one combined vote. The candidates receiving the most votes will fill the seats in order of their vote total until all seats are filled. If a tie should occur for the last vacancy, only those candidates tied shall participate in a run-off ballot to fill the last seat. A majority vote shall not be required to serve as a Director. Each voting member shall receive one (1) voting ballot for all seats to be filled on the Board. Any ballot containing two or more votes for the same candidate shall be void.

Section 65. All officers and directors elected shall hold office from the close of each annual conference until the close of the succeeding annual conference.

Section 76. In all votes, an eligible member's vote shall be counted as one (1) vote.

PROPOSAL #2 of 2:

ARTICLE IV - MEMBERSHIP

Section 1. There shall be ~~six~~ **seven (67)** classes of membership in this Association, namely: **Company, Individual, Active, Independent Contractor,** Associate, Honorary, Retired, Vendor and Supporting.

Section 2. ~~Company Member.~~ A Company member shall be defined as a business entity meeting the requirements of the city and state in which they conduct business and shall be engaged in the process serving, court filing, photocopy, or attorney service business. ~~Company members may advertise their company name in all association produced directories, publications and on the website. Company members shall be eligible for an enhanced listing on the association website under the Company member section. For dues paying purposes, only one Company membership is required in order to allow all Individual members of that company to be associated with that company. Company members may not vote, hold office, elected or appointed, and may not chair a committee(s).~~

Section 32. ~~Individual Active Member.~~ An **Individual Active** Member shall be an individual engaged in the process serving, court filing, **electronic filing,** photocopy, or attorney service business. **Individual Active** members shall be qualified to be a Registered Process Server or Photocopier under the provisions of the Business and Professions Code of the State of California, and shall have no felony convictions or convictions of a misdemeanor involving moral turpitude within the immediate preceding seven years. ~~Individual members may not advertise a company name of any kind unless the Individual membership is attached to a Company membership. Individual Active~~ members shall be entitled to a listing in the association Membership Directory under the **Individual member section** which will list their name, **company name,** address, telephone, fax and e-mail only. ~~Individual Active members may advertise their name and/or company name, in all association produced directories, publications and on the website. Individual Active~~ members may vote, hold office, elected or appointed, and **may serve on or** chair a committee. **Individual Active** Membership in this Association is not transferable.

Section 3. ~~Independent Contractor Member.~~ *An Independent Contractor member shall be an individual engaged in the process serving, photocopy or court filing business inside the State of California. An independent contractor is a natural person that provides goods or services to another entity under terms specified in a contract or within a verbal agreement. Independent contractor members may advertise their name, and/or company name, in the member's only section of the website. Independent Contractor members may not vote or hold office, elected or appointed; but may serve on or chair a committee.*

Section 4. Associate Member. An Associate member shall be an individual engaged in the process serving, court filing, photocopy, or attorney service business located outside of the State of California. Associate members shall be entitled to a listing in the association Membership Directory under the Associate member section; however, they may not make reference to any branch office(s) that they may have in California, unless they opt to also have a Company an Active membership for at least one of their California branches (see Company Membership). Associate members may advertise their company name in all association produced directories, publications and on the website. Associate members shall be eligible for an enhanced listing on the association website under the associate member section. Associate members may not vote, or hold office, elected or appointed; but may serve on or chair a committee.

Section 5. Honorary Member. Honorary members shall have all rights and privileges of membership including the right to vote and to hold elected office. The privilege of this membership shall be determined by a majority vote of the Board of Directors. An Honorary member shall be dues-exempt.

Section 6. Retired Member. A Retired Member shall be a current or former Individual Member of this Association, in good standing, who has permanently retired from the practice of process serving, court filing, photocopy, or the legal support profession. A Retired member shall have all the rights and privileges of membership, including the right to vote and to hold elected office. The privilege of this membership shall be determined by the Membership Committee upon application by the individual. A Retired member shall be dues exempt.

Section 7. Vendor Member. A Vendor member shall be any company associated with the process serving, court filing, photocopy, or attorney service profession, except owners, partners, or stockholding corporate officers of process serving, photocopy or attorney service firms. Vendor members may advertise their company name in all association directories and publications. Vendor members shall be entitled to a listing in the association Membership Directory under the Vendor member section. Vendor members may not vote, hold any office, elected or appointed; but may serve on or chair a committee.

Section 8. Supporting Member. A Supporting member shall be an individual who is associated with the legal profession who is not otherwise eligible for any other membership category. Supporting members shall be entitled to receive all publications and notices, attend meetings, training courses, annual conferences, and may serve on committees. Supporting members may not vote or hold office, elected or appointed.

Section 9. Each application must be accompanied by the full membership dues. Each application must be considered by the Membership Committee. If the Membership Committee determines that the applicant meets all requirements, the applicant shall be deemed a member. In the event an application does not meet all requirements, it shall be presented to the Board of Directors for review. If the application is rejected, all dues paid shall be refunded.

Section 10. The resignation of any member in good standing shall be accepted when made in writing to the Secretary-Treasurer. The Secretary-Treasurer, immediately upon receipt of such resignation, shall notify the President that such resignation has been received and accepted.

Section 11. A Founding member is defined as one of the original founders of this Association whose membership is in good standing. Only Founding members in good standing may indicate that they are Founding members.



CALSPPro Advertising Update

By Robert Porambo, Advertising Chair

The advertising committee is continuing its efforts on increasing vendor members, increasing advertising as well efforts to network with other state associations. I've included our goals that were established at the beginning of the year for our members to review.

1. Target strategic business partners
 - A. Cell phone providers
 - B. Aflac (now a member)

- C. Fuel stations
- D. Data provider
- E. Maintain our current business partners

2. State associations
 - A. Trade advertising with other state associations
 - B. Increase affiliate members
3. Business partner spotlight
 - A. Articles on the companies or individuals that support CALSPPro

4. New advertisers
 - A. Target new companies to advertise in CALSPPro

This committee remains focused and dedicated to bringing added value service to our members. On behalf of Tom Bowman, Tom Alkema and myself it has been a genuine privilege and an honor to serve CALSPPro on the advertising committee. Thank you.

| 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 CALSPPro 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 |



EDUCATION

Continuing Education Report *by Kristian Pujol*

Free C.C.P.S. Workshop and Exam at the 2017 Annual Conference *High Performance Techniques for Process Serving*

This year at CALSPro's Annual Conference in Rancho Mirage, we will be offering a free CALSPro Certified Process Server (C.C.P.S.) Workshop and Exam to those conference registrants who are interested in attending. This is an opportunity to earn or renew your C.C.P.S. designation, or extend it for a year by just attending the workshop. In the past, we have typically offered only the examination (with a quick exam review beforehand) on the last day of conference. This year we are conducting a special C.C.P.S. Workshop on Sunday morning. This class will be condensed into a three-hour workshop (9am-12pm) covering most of the fundamental topics, and then the exam will be offered immediately thereafter (12pm-1pm) to those who want to take it and stand out above the rest!

To keep in line with this year's theme, the workshop will focus on "high performance" techniques for process serving. A high performing and efficient process server must have the proper tools, approach, knowhow, and

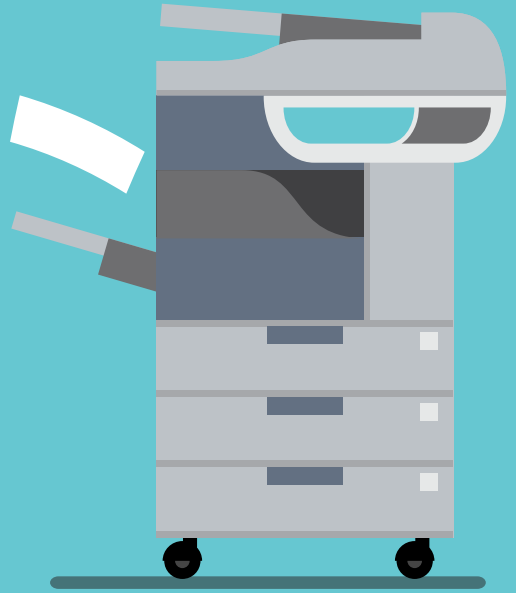
knowledge to be successful and stay out of harm's way. The workshop will also benefit SOP Department managers and company personnel since they too must be aware of not only all the pertinent rules, codes and case law precedents, but also numerous safety measures and technological tools available to keep their contractors and employees safe and viable. Ensure that your office managers and staff remain knowledgeable and resourceful by signing them up for the workshops! Client retention, workload and workflow, profit margins, and a company's general reputation are all correlated to the success rate of your process servers and company staff. What better way to improve overall job knowledge and out in the field success than by attending this upcoming workshop?

Please take advantage of this member benefit and opportunity to attend a complimentary C.C.P.S. workshop (and exam) at this year's annual conference! The only requirement is that you must pre-register for the

workshop when submitting your conference registration form. This is so we can accommodate the right number of people and provide enough materials for all workshop attendees and examinees. If you are unable to attend the workshop but later change your mind, simply send us an email or give CALSPro a call by September 15th and we will gladly add your name to the list of attendees. Let's end this year's conference with a high-test performance and high turnout at the Sunday C.C.P.S. workshop, available to you at no cost at the Omni Resort! Coffee and light snacks will be provided.

Photocopy Focus

By Tom Alkema, CALSPro Board Member



For the past 4 years I have been involved in CALSPro as a “photocopy” focused member. My focus has been to not just look out for the interest of my company but also for the interest of all of us, big and small, doing legal photocopy work in California. This is not unique to the association as all of the involved members do so as a commitment to our industry in their respective areas of expertise and interest.

As I survey our membership and participation in the Association, I unfortunately, see very few companies and or individuals whose businesses are predominantly centered on providing photocopy services. While there are many members who offer some photocopy services, of those in our industry with the majority of their business being copy service work I would say that less than 5% are members.

There are several out there who fit the description of being predominately a photocopy service but one has to wonder WHY it is that few of them are working with us to protect our (their) interests in this industry? To flip this thought let’s ask it this way: “why would they join our association and our efforts?”

The straight forward answer is that it takes the right resources with the right know how and ample experience to effectively

guard against legislation that can or WILL have an ill impact on our businesses. CALSPro has those resources but we need more of us.

To illustrate the point of our effectiveness let’s take a quick look back a few years. In 2011 and 2012 there was a back to back push to change sections of Evidence Code 1158 & 1563 allowing for the witness fee to be raised from \$15.00 to \$30.00 and the price per page for copying by a facility to be raised from \$0.10 per page to \$0.50 and or \$0.25. Other elements of the proposed changes would have allowed custodians to bypass copy services all together. Those would have been game changers to our businesses in a negative way.

In contrast to the results consider SB863, workers compensation reform from 2012. A group of copy services who do work in this sector and who are not members of CALSPro attempted to get detrimental language pulled from the bill; however, without the proper resources they could not get it changed. Then those same companies plus many more worked together, outside of CALSPro, to try and direct the rule making process such that their businesses would not be harmed. The results from the passage of SB863 and the regulations for implementation of the bill are that several copy services have gone out of business, sold or are looking for other avenues in which to work.

We could not say that CALSPro would have accomplished with SB863 what we did with the other bills, but we feel strongly that those in our industry would be better served by putting their trust and effort with our Association than to try and do it alone or on the fly.

This year we watched SB241, currently “inactive”, which proposes to change the fees that can be charged to a consumer when requesting copies of medical records for “personal use”. In assessing the bill there are two reasons why I recommended CALSPro stay neutral while at the same time silently favoring the change: 1) Neutral because it proposes to amend Health and Safety Code 123110 which is not a concern for copy services involved in legal photocopy because it applies to personal requests for records; 2) Favorable because the law clarifies that medical providers and their copy services can only charge for the time and materials needed to “actually copy the records”, time at the machine if you will.

The good news is that SB241 prevents custodians and their hired companies from charging on a personal request for the time to locate records, review them, managing the inventory, keeping them secure, (i.e., business costs) etc, etc... I suggest you go to the CALSPro Active

Continued on page 30



CALSPRO Membership Update

By Cliff Jacobs, Membership Chair

To Promote, Protect and Preserve Our Profession and Our Members

At this year's Annual Conference, our members will have the unique opportunity (due to our 10 year strategic planning session which occurred in July) to provide meaningful input through their questions, comments and votes on our membership structure, and direction in the future. This last strategic planning session occurred in 2007 when our membership structure changed, and our name changed to CALSPRO. As a member, your participation will be an important part of shaping our future; and therefore, I urge you to be a part of this year's Conference.

The recent signing by the Governor of CALSPRO Bill AB 1093, which amends CCP 415.20, clarifies that when the only address reasonably available to the server is a Commercial Mail Receiving Agency (CMRA), service may be affected on the **first attempt** by leaving a copy with the CMRA. This eliminates the requirement to establish diligence with additional attempts; and also shines a renewed light on the original purpose of CALSPRO's Founding.

CALSPRO's Mission and dedication to that Mission has remained strong and

purposeful for almost 50 years. It is truly the underlying reason why all legal support professionals owe a debt of gratitude (and their livelihood) to CALSPRO, and it's longstanding commitment to ensure that our profession is protected, that we remain relevant, and that we ensure our role as champions of due process well into the future. Take a look at our long and strong LEGISLATIVE HISTORY.

In this fast paced world of "Show me the money", and "What have you done for me lately?" CALSPRO continues to do both, as can be seen by the passing of AB 1093, just weeks ago; which will save process servers thousands of attempts statewide each year, equating to less expense and therefore more money in their pockets.

Our BEST PRACTICES include the following, which speak to **preserving** and **protecting** our profession:

2. The **preferred** and most effective and verifiable **method** for service of process is the **personal, in-person delivery** of process to the named individual or entity.
3. **Primary service of process should be accomplished by a disinterested**

third party, knowledgeable of the applicable codes, who complies with the registration requirements as described in the Business and Professions Code.

CALSPRO has been providing "Industry Insurance" for almost 5 decades; and everyone involved in Legal Support has benefited all along the way. Your membership and support of the State Association that has done so much for you over the years, is something to be very proud of.

And CALSPRO has risen to the challenge of **promoting** our profession, by courageous, out of the box thinking. By positioning the Association to not only have a seat at the table where future decisions will be made about how Legal Support companies will continue to play a vital role in due process and the Courts; CALSPRO helps in keeping the wheels of justice turning. In addition, through strategic memberships and involvement with relevant groups (e.g. the Coalition for Improved Court Access (CICA)), CALSPRO stays at the cutting edge of these ongoing dialogues directly impacting our profession.

Continued on page 30

Membership - continued from page 29

CALSPRO, courtesy of Mike Belote- our Legislative Advocate for 30+ years, has its fingers directly on the pulse of Legislative matters, no matter how large or small, that could have even the slightest impact on our livelihoods. The long term relationships that have grown over this period, combined with Mike's keen awareness of our political culture, keeps CALSPRO in the know immediately as things occur. This allows us to understand right away, and at a deep level, where we are headed legislatively, as a State; while providing the opportunity for CALSPRO to weigh in on matters in which we have

developed specialized knowledge and expertise.

So, please know that your support of this association is deeply appreciated; and if you have not yet committed to coming to Conference this year, please consider coming and spending face-time with others who recognize that CALSPRO has been stalwart in providing the kind of value that goes well beyond dollars and cents; the kind of value that keeps our profession relevant.

Photocopy - continued from page 28

Legislative website, scroll down to SB241 and click on the VIEW ANALYSIS link to read the thoughts of the legislators. What I see is how this could work in our favor down the road by reducing custodian copy fees to "actual time copying" and not all other ancillary charges they load on top.

It is true that there has not been much legislative activity since 2012 that could impact photocopy businesses, but that is no indication that things have not and are not changing. Does anyone out there think we have challenges in the photocopy sector of our industry? I think so! So where do we go from here? Is it just a matter of membership? Yes and No!

Yes we want and need your membership for two reasons. First, the number of members in our association is meaningful. The larger the membership the bigger the voice we have when we lobby for legislation or join in on conversations in Sacramento and elsewhere. Secondly, there are costs associated with lobbying for or against votes. We get a tremendous amount of value from our lobbyist Mike Belote and his track record proves it.


No we don't just want your membership, we want your participation, your perspective and your knowledge; you are a valuable resource to all of us.

So with all that I've said let me conclude by saying we are really excited to announce

their will be a break out session of photocopy services at the annual conference this year. We hope to get us together and discuss a possible legislative agenda for the 2018 calendar year. I have a few ideas and will hold them for the gathering, but I can tell you that I have had conversations with a few companies and have seen a group working, outside of CALSPRO, to address concerns with continued fallout from SB863.

Please accept my personal invitation to attend 2017 Conference and more importantly to consider joining CALSPRO so we can keep this a strong vibrant association that helps all of us in the legal support services industry.

Respectfully yours,



Thomas D. Alkema

Member, Board of Directors

Newsletter Chairperson

CALSPRO COMMITTEES

ADVERTISING

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

ASSAULT ADVISOR

Tom Bowman
tbowman@sterlingmadison.com

BY-LAWS

Lauri Taylor
lauri@amslegal.net

CONFERENCE

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

CONTINUING EDUCATION

Kristian Pujol
kris@comproserve.net

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
707.344.8352
cjacobs@firstlegalsupport.com

NEWSLETTER

Tom Alkema
talkema@ronsinc.com

TECHNOLOGY

Andrew Gowing
andrewg@janneyandjanney.com

WEBSITE

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

Referral Discount Program



\$50.00 off Individual Membership
\$75.00 off Company Membership
\$25.00 off Associate Membership

New Member Information

Name: _____

Company: _____

Referring Member Information

Name: _____

Company: _____

A new Individual, Associate or Company Member joining CALSPRO shall have their membership fee instantly reduced by the amount as stated above by entering the referring member's name as requested on the application, as well as submitting this certificate along with the application. The Existing referring member will receive up to two referral discounts upon renewal the next year, but may offer the new member discount without limit to potential new members all year long. Existing members will qualify for the two highest renewal discounts as follows: \$50.00 discount for a new Individual member, \$75.00 discount for a new Company member, and/or \$25.00 discount for an new Associate member upon their approval as a new member.

Submit this document with your new membership application which can be downloaded from www.calspro.org

CALSPRO 2016-2017 Officers

PRESIDENT

Larry Kirlin

559/233-1993 – ph

888/943-1355 – fax

lkirlin@firstlegalsupport.com

VICE PRESIDENT

Robert Porambo

619/549-4853 – ph

619/685-4294 – fax

rporambo@knoxservices.com

SECRETARY/TREASURER

Ken Hastings

951/296-2669 – ph

951/296-2770 – fax

service@hastingspps.com

2016-2017 Board of Directors

Tom Alkema

909/594-5995 – ph

909/598-2308 – fax

talkema@ronsin.com

Andrew Gowing

213/628-6338 – ph

213/628-6338 – fax

andrewg@janneyandjanney.com

Kristian Pujol

805/650-9291 – ph

805/658-8170 – fax

kris@comproserve.net

Chad Barger

661/327-8022 – ph

661/327-8179 – fax

cbarger@attorneyscertified.com

Ken Hastings

951/296-2669 – ph

951/296-2770 – fax

service@hastingspps.com

Lauri Taylor

661/324-8018 – ph

661/324-0451 – fax

lauri@amslegal.net

Tom Bowman

408/295-3300 – ph

408/491-9772 – fax

tbowman@sterlingmadison.com

Larry Kirlin

559/233-1993 – ph

888/943-1355 – fax

lkirlin@firstlegalsupport.com

Immed. Past President

Cliff Jacobs

707/344-8352 – ph

cjacobs@firstlegalsupport.com

Andy Estin

310/838-7048 – ph

818/317-6650 – cell

estin@ca.rr.com

Robert Porambo

619/549-4853 – ph

619/685-4294 – fax

rporambo@knoxservices.com

Legislative Advocate

Michael D. Belote, Esq.

Administrator

Jennifer Blevins, CMP

jennifer@caladmanagement.com

Membership/Co-Administrator

Stephanie Schoen

stephanie@caladmanagement.com

Publications

Jen Gross, CMP

jen@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